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Travel Activities & Motivation Survey

Interest In Casino Gambling

Profile Report

TAMS
Travel Activities &
Motivation Survey

May, 2001

Lang

Travel Activities & Motivation Survey

Prepared by:

Lang Research Inc.

on behalf of

Atlantic Tourism Partnership

Canadian Tourism Commission

Department of Canadian Heritage

Greater Toronto Hotel Association

Manitoba Ministry of Industry, Trade & Tourism

Northern Ontario Heritage Fund

Ontario Casino Corporation

Ontario Ministry of Agriculture, Food & Rural Affairs

Ontario Ministry of Tourism, Culture & Recreation

Ontario Tourism Marketing Partnership

Parks Canada

Saskatchewan Tourism Authority

Tourism B.C.

Tourism Toronto

Yukon Government Department of Tourism

TAMS
Travel Activities &
Motivation Survey

Lang

Interest in Casino Gambling

- Key Findings -

In general, Americans are much more interested in casino gambling than Canadians. Thus, 47.3 % of American travellers have at least a moderate interest in casino gambling, while 38.2 % of Canadians exhibit a moderate interest. Moreover, Americans were 149 % more likely than Canadians to be classified as Casino Gambling Enthusiasts. In part, this may reflect the fact that there are a greater number of casinos in the United States than in Canada.

There are important demographic similarities and differences between Americans and Canadians who share an interest in casino gambling. In both countries, the level of interest in casino gambling is highest among the affluent. However, American male travellers were more likely to be Casino Gambling Enthusiasts than American female travellers, while in Canada there was no difference between males and females.

In Canada, the likelihood that a trip will be taken domestically over the next two years is not associated with interest in casino gambling. Alternatively, in the United States, the likelihood that a trip will be taken to Canada over the next two years increases from 35 % among those with low interest in casino gambling to 44 % among those who are Casino Gambling Enthusiasts.

Casino Gambling Enthusiasts were more likely to have sought out vacation experiences associated with personal indulgence (e.g., to experience the good life, visiting a casino, experiencing city life such as nightlife). They were also more likely to have pursued sports and learning vacation experiences (e.g., to participate in a hobby or sport). Advertising and promotional materials designed to promote casino gambling-related tourism should emphasize the opportunities for entertainment and personal indulgence offered by the destination.

Individuals who have an interest in casino gambling were more likely to be active in outdoor activities while travelling. This is especially apparent among Casino Gambling Enthusiasts, who tend to be more affluent and hence more active in outdoor activities while travelling. Casino Gambling Enthusiasts were especially likely to be interested in fishing, golfing water sports and team sports. Providing opportunities to participate in these activities as part of casino gambling tourism packages may be especially effective, particularly for affluent travellers.

Interest in Casino Gambling

- Key Findings (Continued) -

As one would expect, Casino Gambling Enthusiasts were more likely to have visited a racetrack. As well, Casino Gambling Enthusiasts also attend sports events and enjoy shopping/dining. Combining casino gambling with opportunities to attend sports events, gamble in some other way, or to dine and shop may be particularly appealing to the Casino Gambling Enthusiasts.

Casino Gambling Enthusiasts were more likely to rely on their own experience when planning their vacations. If their previous experiences were positive, they might return or seek a similar destination. They also consulted a larger variety of information sources and especially friends and family, travel agents, the Internet, newspaper and magazine articles, airline reservation systems, newspaper and magazine advertising, and information provided by auto clubs.

In terms of new tourism products, Casino Gambling Enthusiasts were most interested in train trips through natural terrain, Great Lakes cruises, wine tours and cultural festivals. Casino Gambling Enthusiasts may be responsive to tourism packages that combine casino gambling with these types of events and tours.

Casino Gambling Enthusiasts, and to a certain extent those with a moderate interest in casino gambling, like to read the travel section of their daily newspaper and travel magazines. They are also relatively heavy viewers of professional sports on television, and daytime television. These may be the most efficient media channels to reach this audience.

Intérêt à l'égard des jeux de casino

- Principales conclusions -

En général, les Américains se montrent beaucoup plus intéressés aux jeux de casino que les Canadiens. Ainsi, 47,3 % des voyageurs américains ont au moins un intérêt modéré à l'égard des jeux de casino, comparativement à 38,2 % chez les Canadiens. De plus, les Américains ont 149 % plus de chances que les Canadiens d'être classés comme des amateurs de jeux de casino. En partie, ces statistiques peuvent refléter le fait que les États-Unis comptent davantage de casinos que le Canada.

Il existe d'importantes similarités et différences démographiques entre les Américains et les Canadiens qui partagent un intérêt à l'égard des jeux de casino. Dans les deux pays, le niveau d'intérêt à l'égard des jeux de casino est plus élevé parmi les gens plus fortunés. Cependant, les voyageurs mâles américains sont davantage susceptibles de constituer des amateurs de jeux de casino que les femmes américaines, alors qu'au Canada, il n'y a pas de différence entre les hommes et les femmes.

Au Canada, la probabilité d'effectuer un voyage au pays au cours des deux prochaines années n'est pas liée à un intérêt quelconque à l'égard des casinos. Par contre, aux États-Unis, la probabilité d'effectuer un voyage au Canada au cours des deux prochaines années passe de 35 % parmi ceux ayant un faible intérêt pour les jeux de casino à 44 % parmi ceux qui sont considérés comme des amateurs de jeux de casino.

Les amateurs de jeux de casino sont davantage susceptibles de rechercher des expériences de vacances associées à des plaisirs personnels (comme goûter aux plaisirs de la belle vie, visiter un casino, faire l'expérience de la vie nocturne dans une grande ville, etc.). Ils sont également davantage susceptibles de rechercher des expériences de vacances liées aux sports ou à des occasions d'apprentissage (comme s'adonner à un passe-temps ou pratiquer un sport). Le matériel de promotion et de publicité conçu pour encourager le tourisme lié aux jeux de casino devrait mettre l'accent sur les possibilités de s'amuser et de profiter de plaisirs personnels qu'offrent le casino.

Intérêt à l'égard des jeux de casino

- Principales conclusions (suite) -

Les personnes qui s'intéressent aux jeux de casino sont davantage susceptibles de participer à des activités extérieures durant leur séjour. Cela semble particulièrement vrai chez les amateurs de jeux de casino, qui sont souvent plus fortunés et qui, par conséquent, tendent à participer davantage à ce type d'activités durant leur séjour. Les amateurs de jeux de casino sont particulièrement susceptibles de s'intéresser à la pêche, au golf, aux sports nautiques et aux sports d'équipe. Inclure dans les forfaits de voyage au casino des possibilités de participer à ces activités pourrait se révéler très efficace, surtout avec les voyageurs plus fortunés.

Comme on pouvait s'y attendre, les amateurs de jeux de casino sont davantage susceptibles d'avoir déjà visité une piste de course. De plus, ils assistent également à des événements sportifs, en plus de s'adonner au magasinage et de manger au restaurant. Combiner les jeux de casino avec des occasions d'assister à des événements sportifs, et de jouer d'une autre façon, de faire du magasine ou de s'offrir un repas au restaurant pourrait se révéler particulièrement attrayant pour les amateurs de jeux de casino.

Les amateurs de jeux de casino sont davantage susceptibles de se fier à leur propre expérience pour planifier leurs vacances. Si leurs vacances précédentes ont été réussies, ils auront tendance à retourner au même endroit ou à chercher une destination similaire. Ils consultent également un large éventail de sources d'information, dont les amis et la famille, les agents de voyage, l'Internet, les articles de journaux et de magazines, les systèmes de réservation des compagnies aériennes, les publicités dans les journaux et les magazines et les clubs automobiles.

Quant aux nouveaux produits touristiques, les amateurs de jeux de casino sont davantage intéressés par les voyages en train à travers des paysages naturels, les croisières sur les Grands Lacs, les tournées vinicoles et les festivals culturels. Ils pourraient être intéressés par des forfaits de voyage combinant les jeux de casino avec ce type d'événements et d'activités.

Les amateurs de jeux de casino, et dans une certaine mesure les personnes ayant un intérêt modéré dans les jeux de casino, aiment lire la section voyages des journaux quotidiens et des magazines de voyage. Ils écoutent également beaucoup d'émissions sportives à la télévision de même que d'autres émissions diffusées durant la journée. La télévision pourrait par conséquent être le média le plus efficace pour rejoindre cet auditoire.

Table of Contents

Executive Summary	ii
Conclusions Principales	iv
Background	1
Casino Gambling Interest Index: Method	2
Interest in Casino Gambling: Canada vs. U.S.	3
Interest in Casino Gambling: Canada By Province	4
Interest in Casino Gambling: U.S. By Region	5
Interest in Casino Gambling: By Demographics	6
Interest in Casino Gambling: By Market Segment	8
Interest in Casino Gambling: Travel in Canada	10
Intentions to Travel to Canada in Next Two Years	13
General Vacation Experiences Sought	14
Outdoor Activities Sought During Pleasure Travel	15
Cultural and Entertainment Activities Sought	16
Accommodation-Related Activities Sought	17
Day and Overnight Touring Activities Sought	18
Sources of Information Consulted to Plan Vacations	19
Interest in New Tourism Products	21
Media Index for Print Media	23
Media Index for Television Programs	24
Percent Using Internet to Research or Book Trips	25
Destination Image Mapping	26
Overall Market Potential Index By Segment	29
Technical Appendices	

Background

An association of Canadian tourism ministries and organizations have collaborated to conduct two large scale surveys to assess the travel activities and motivators of pleasure travel among Canadians and Americans.

This survey, known as the *Travel Activities and Motivation Survey* (TAMS), represents the comprehensive assessment of travel behavior and motivators, and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada and Ontario.

A series of analyses are being conducted using the TAMS database to explore the travel patterns of the marketplace as well as the factors which motivate travel behavior. TAMS consisted of both a telephone survey and a self-completed mailback survey. The survey was conducted in Canada and the United States between September 27, 1999 and April 16, 2000. The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents were selected randomly within the household. People participating in the telephone survey who had travelled in the past two years or expressed interest in travel in the next two years were asked to complete a mailback questionnaire. Overall, 40,271 qualified for the mailback questionnaire. Of these 11,892 (29.4 %) returned usable questionnaires. The response rate was higher in Canada with 5,490 (35.2 %) returning the questionnaire while 6,405 (26.0 %) of the U.S. respondents returned the questionnaire.

This current study examines interest in casino gambling while respondents are not travelling and while they are travelling. The database was used to identify sectors of the market that exhibit a moderate or high interest in casino gambling. This report provides the demographic profile, Canadian travel activities, Canadian travel intentions, vacation experiences sought during the past two years, vacation activities participated in during the past two years, media consumption habits, information sources consulted to plan brief and longer vacations, and impressions of Canada and Ontario relative to the interest shown in casino gambling. This report also provides an Overall Market Potential, identifying those segments that offer the best potential for marketing, advertising and promotional activities related to casino gambling.

Casino Gambling Interest Index

Construction of the Index

The TAMS Mailback Survey contained three items specifically associated with casino gambling that were used to construct an overall Casino Gambling Interest Index. These were:

- How often the respondent had visited casinos during the past two years while not travelling: "frequently", "occasionally", "rarely" or "not at all"
- Whether a casino gambling vacation experience had been sought during the past two years
- Whether the respondent had visited a casino and gambled while travelling in the past two years

The responses to the first of these items (i.e,. the extent to which casinos had been visited during the past two years while not travelling) was converted into a four point scale where "Not at all" was set to "0", "Rarely" was set to "1", "Occasionally" was set to "2" and "Frequently" was set to "3". The two variables, which asked whether or not the individual visited a casino to gamble during the past two years while travelling, were converted into binary variables where "0" was "Did not visit a casino to gamble" and "1" was "Did visit a casino to gamble". The three items were summed up to produce an overall score ranging from "0" to "5". This score was reduced to three levels as follows: A score of "0" was set to "Low Interest", a score between "1" and "3" was set to "Moderate Interest" and a score between "4" and "5" was set to "Enthusiast".

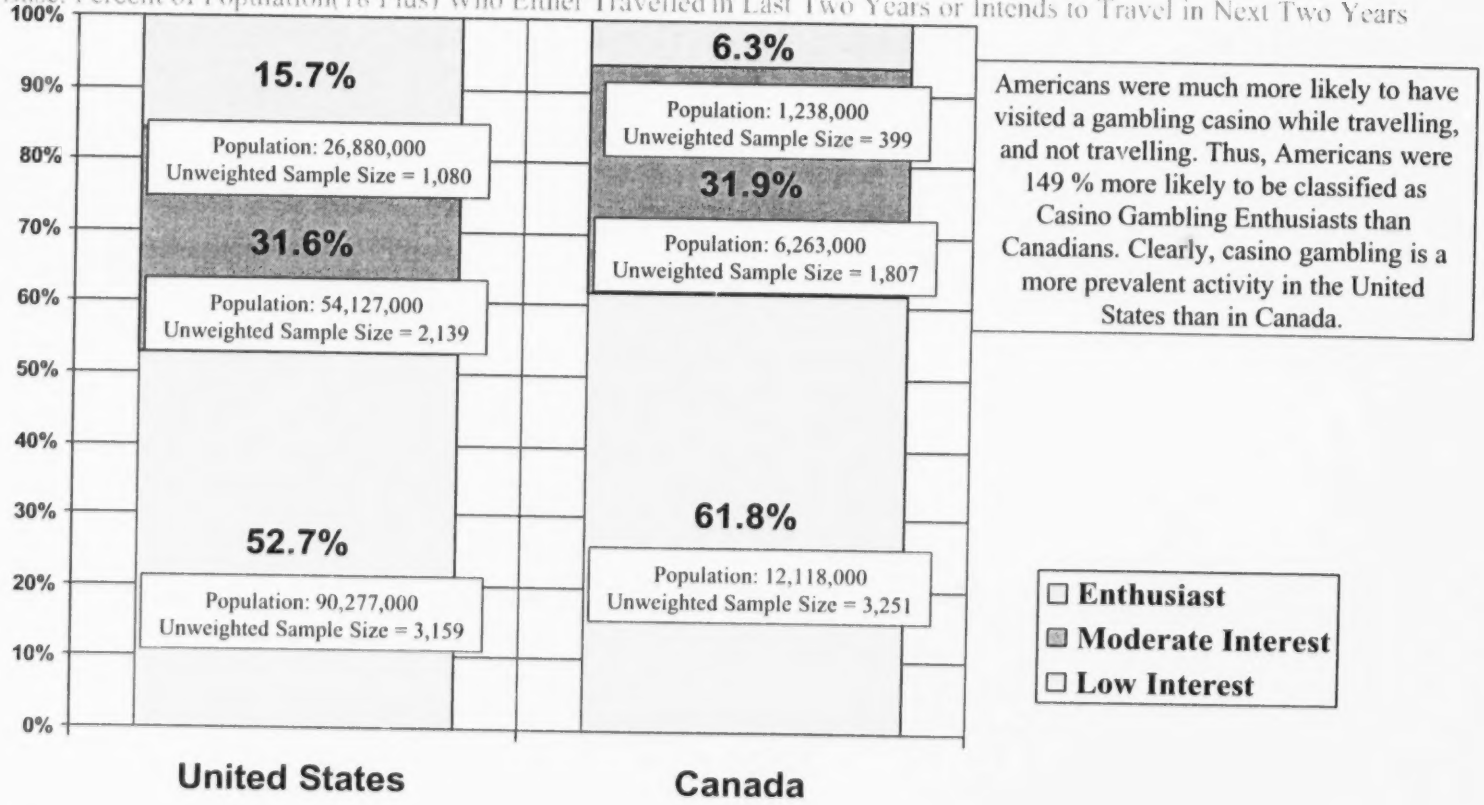
This scoring scheme meant that in order to qualify as a Casino Gambling Enthusiast, it was necessary for those who "frequently visited a casino while not travelling" to have sought out a casino vacation experience or to have visited a casino and gambled while on a trip during the past two years, and those who "occasionally visit a casino while not travelling" to have both sought out a casino gambling vacation experience as well as visited a casino to gamble at least once while on a trip during the past two years. Those who never visited a casino were considered to have a Low Interest while all others were classified as having a Moderate Interest in casino gambling.

Interest in Casino Gambling

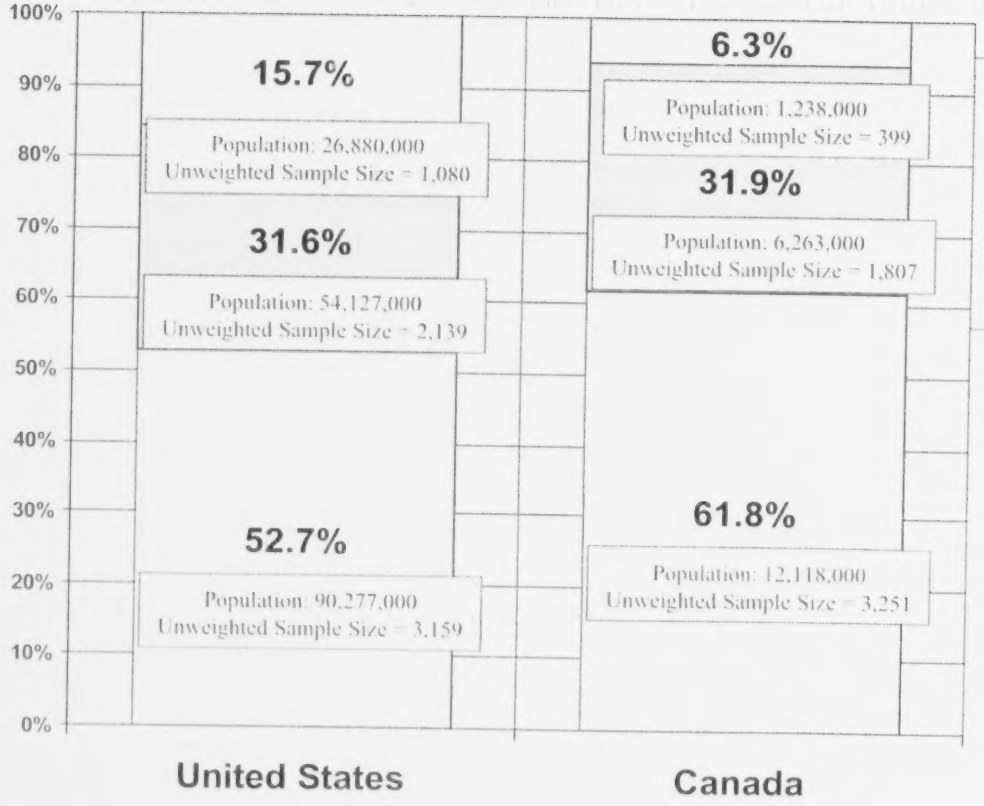
Canada versus United States

Based on Visiting a Gambling Casino While Travelling and Not Travelling

Base: Percent of Population(18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



Americans were much more likely to have visited a gambling casino while travelling, and not travelling. Thus, Americans were 149 % more likely to be classified as Casino Gambling Enthusiasts than Canadians. Clearly, casino gambling is a more prevalent activity in the United States than in Canada.



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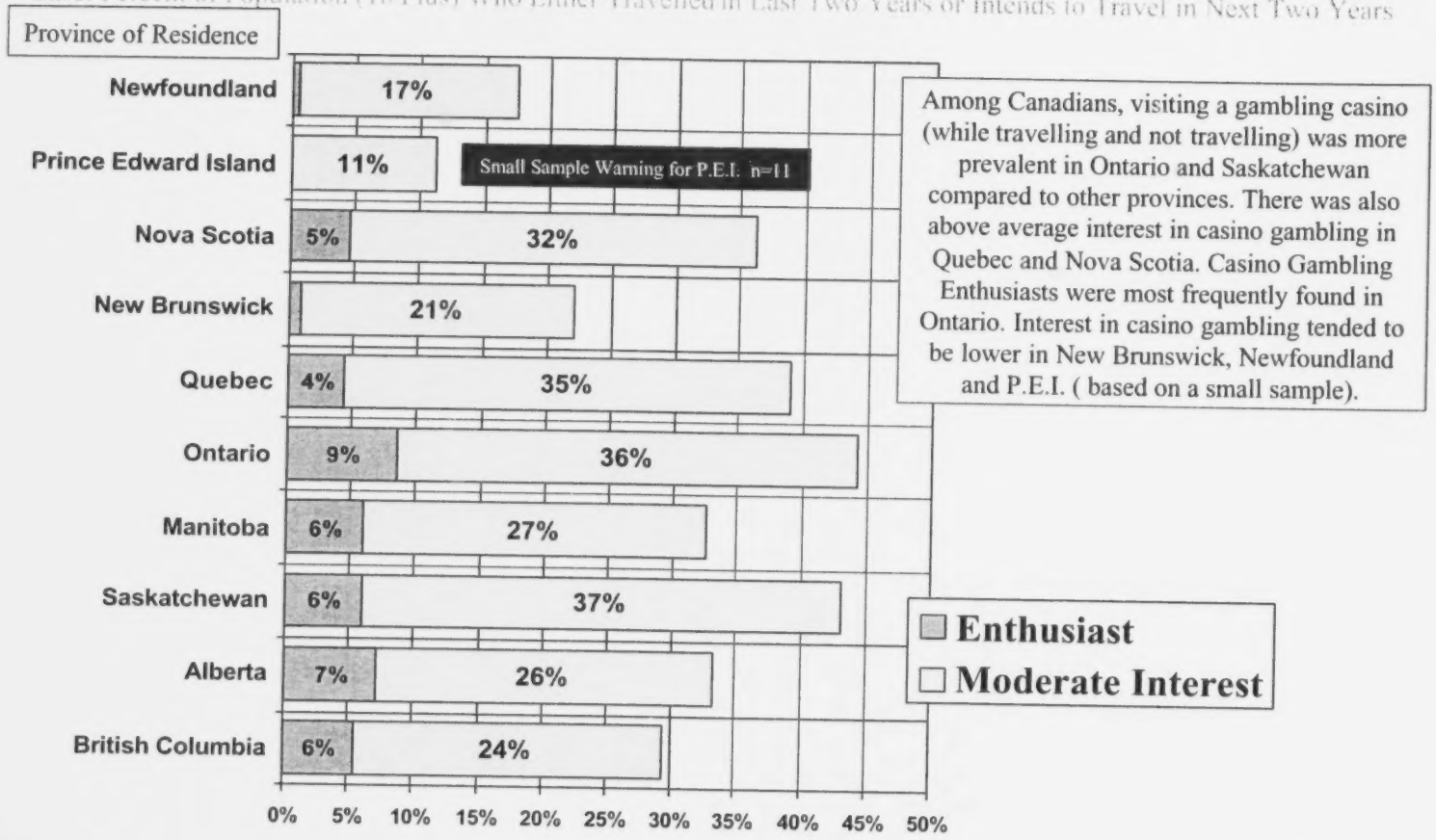
☐ **Enthusiast**
☐ **Moderate Interest**
☐ **Low Interest**

Interest in Casino Gambling
Canada: By Province
Based on Visiting a Gambling Casino While Travelling and Not Travelling

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years

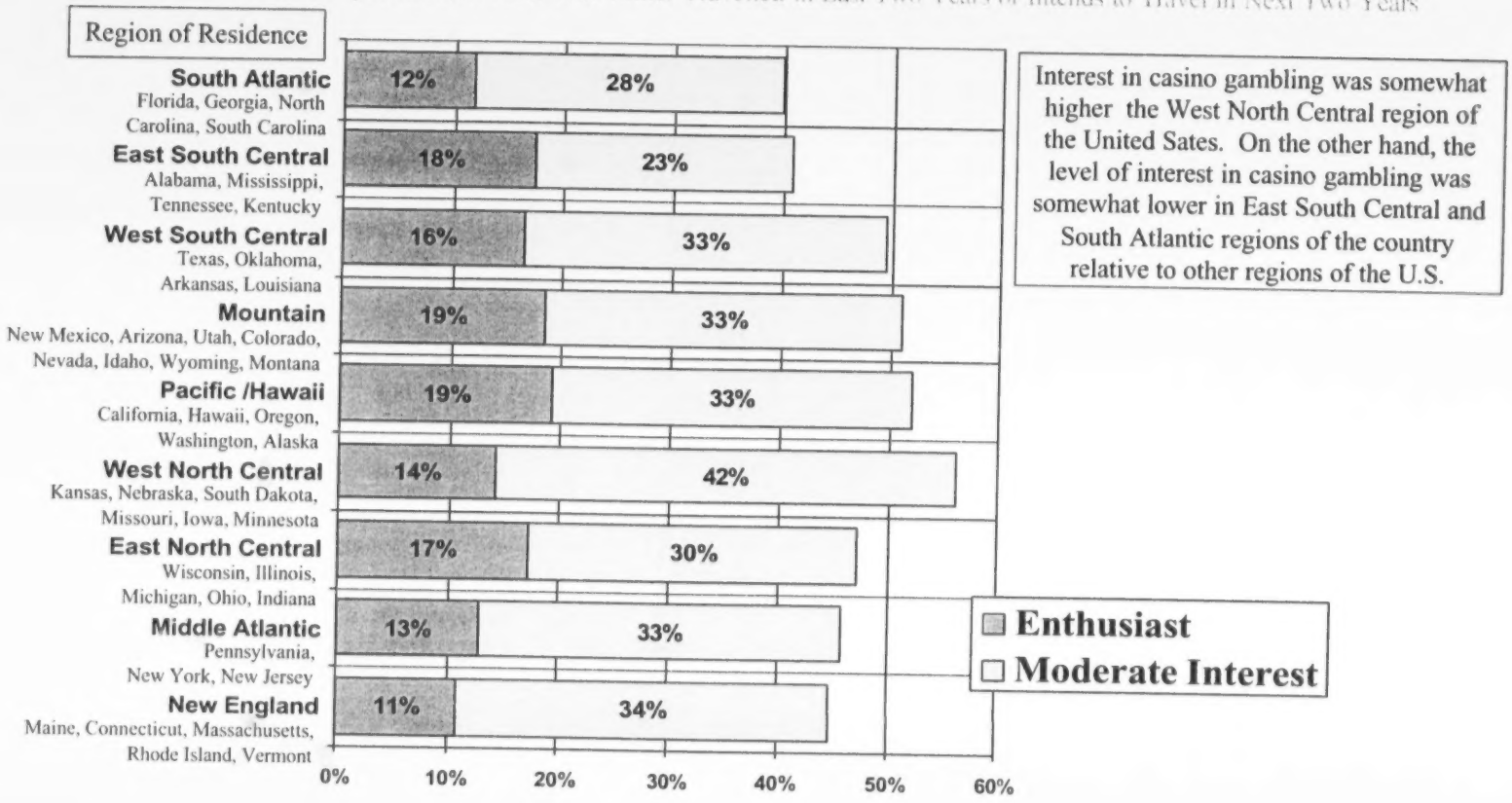


Interest in Casino Gambling

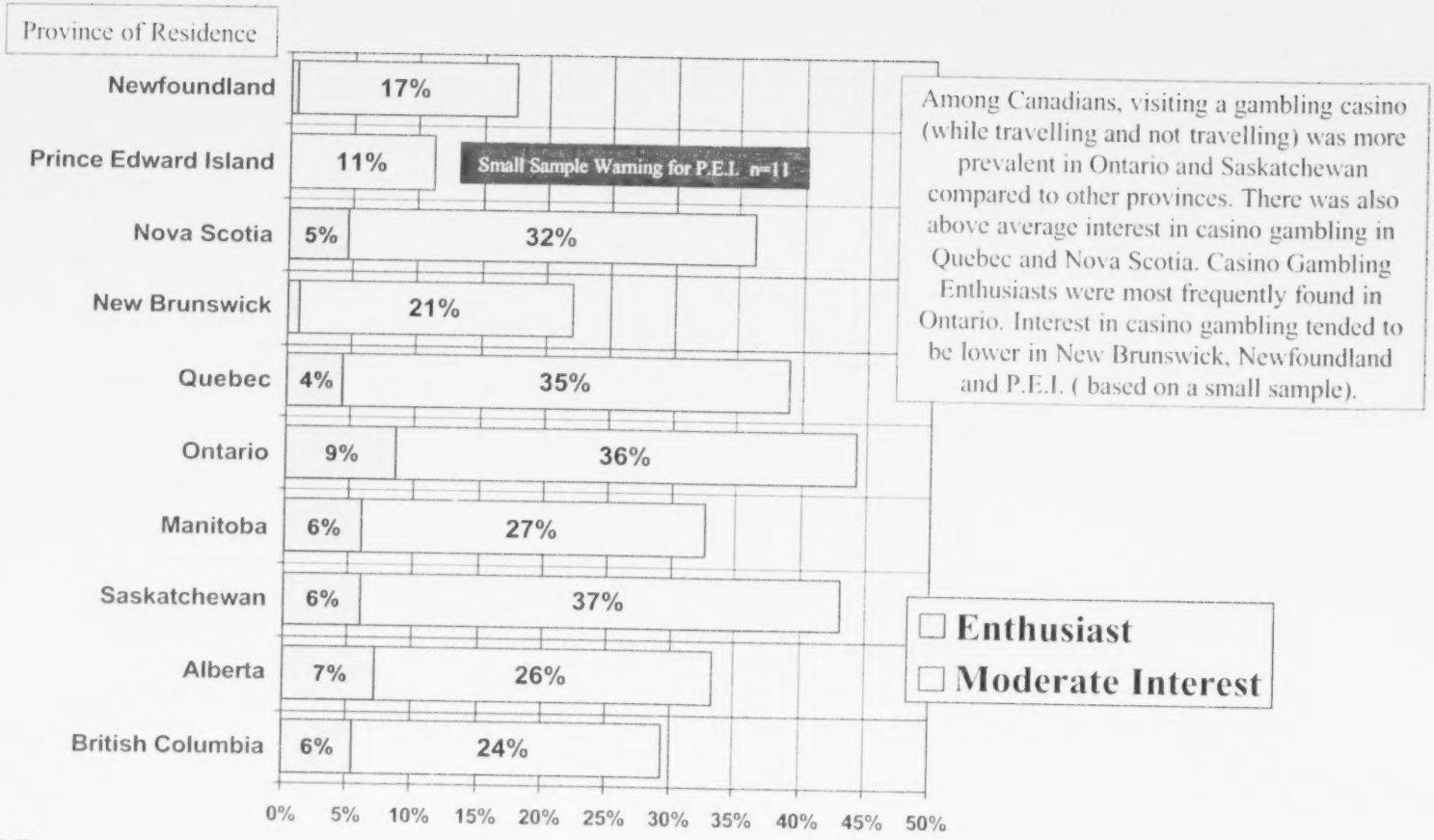
United States: By Region

Based on Visiting a Gambling Casino While Travelling and Not Travelling

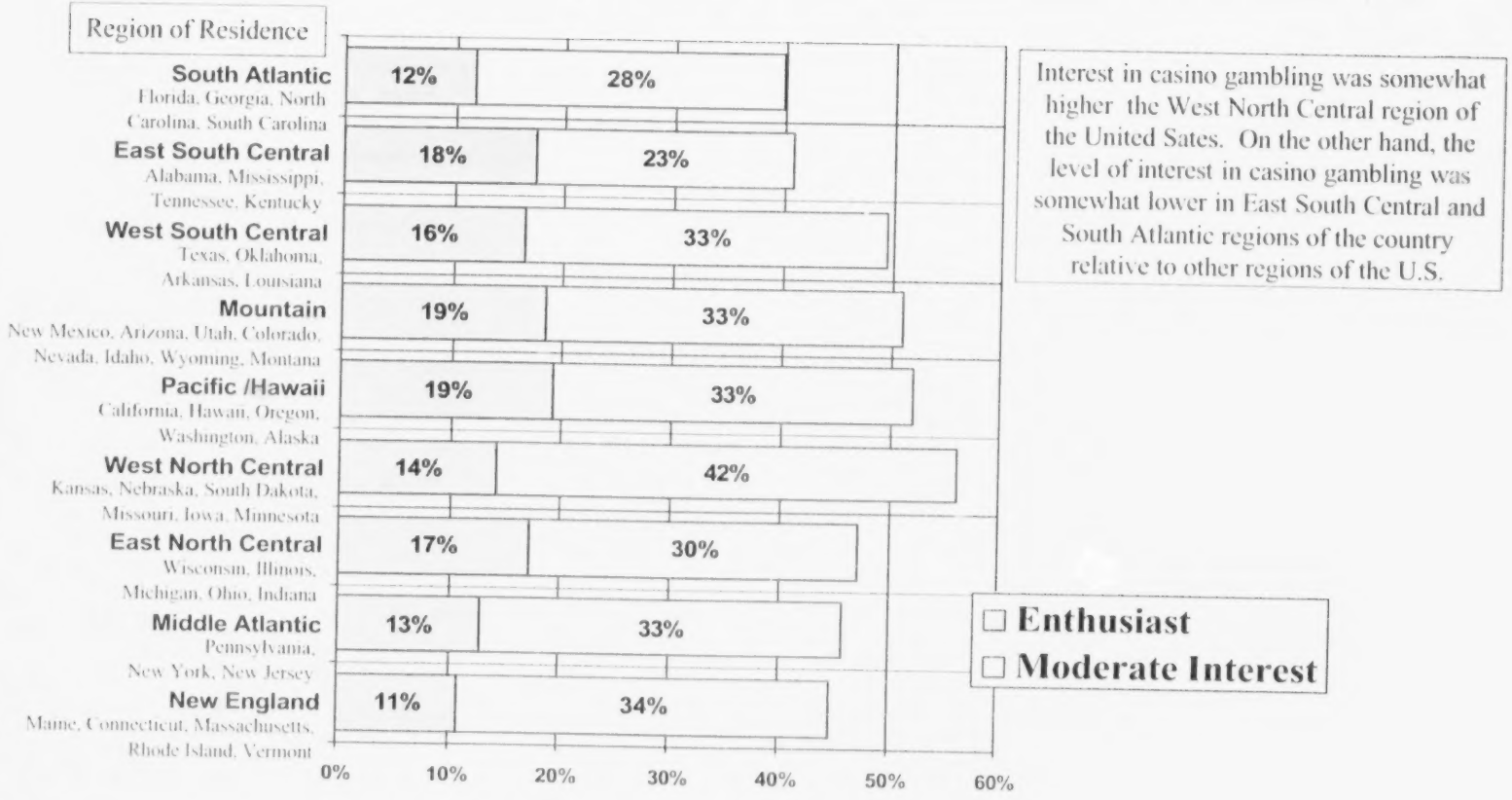
Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



Interest in casino gambling was somewhat higher the West North Central region of the United Sates. On the other hand, the level of interest in casino gambling was somewhat lower in East South Central and South Atlantic regions of the country relative to other regions of the U.S.



Among Canadians, visiting a gambling casino (while travelling and not travelling) was more prevalent in Ontario and Saskatchewan compared to other provinces. There was also above average interest in casino gambling in Quebec and Nova Scotia. Casino Gambling Enthusiasts were most frequently found in Ontario. Interest in casino gambling tended to be lower in New Brunswick, Newfoundland and P.E.I. (based on a small sample).



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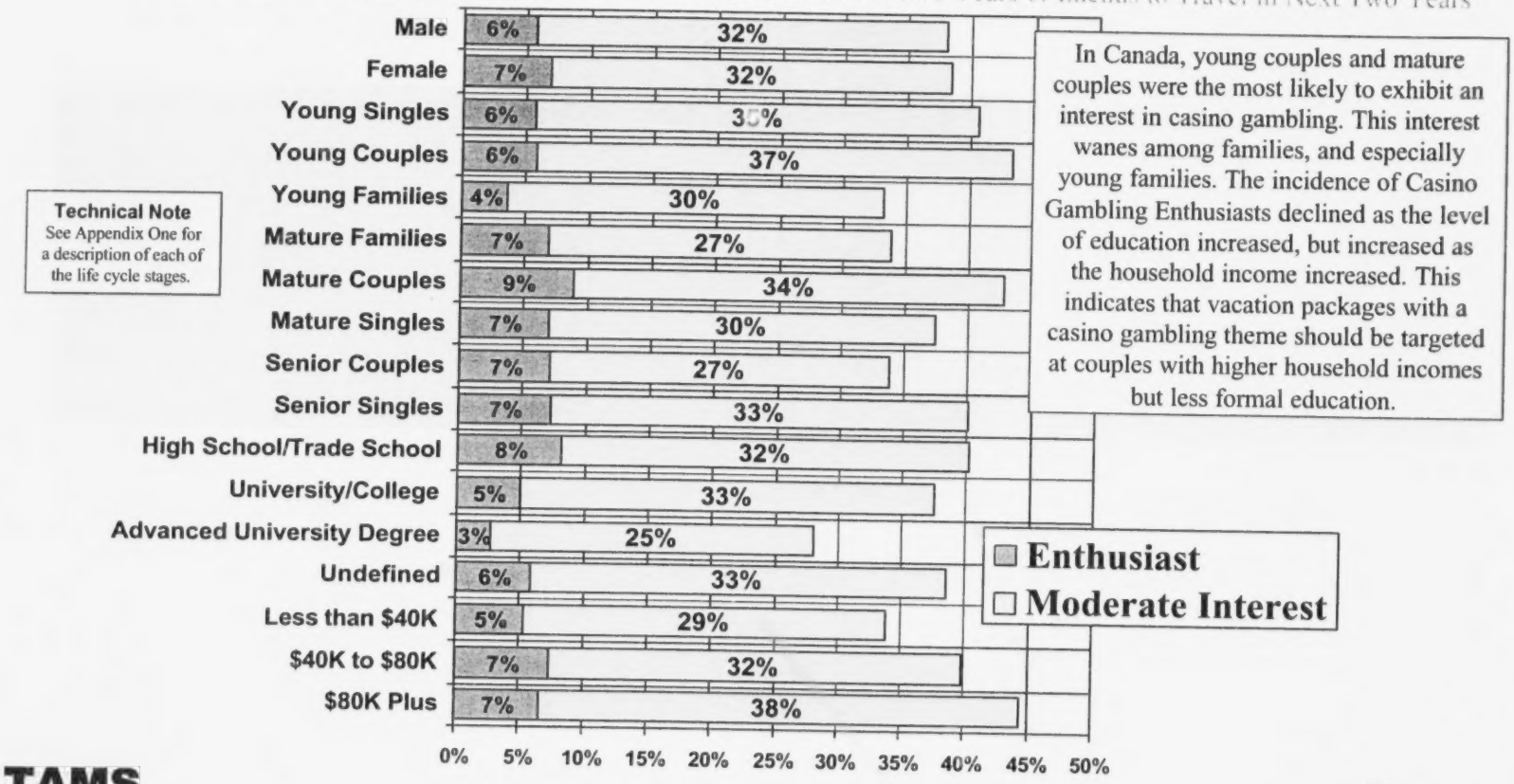
Interest in Casino Gambling

Canada: By Demographics

Based on Visiting a Gambling Casino While Travelling and Not Travelling

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years


Male 6% 32%
Female 7% 32%
Young Singles 6% 35%
Young Couples 6% 37%
Young Families 4% 30%
Mature Families 7% 27%
Mature Couples 9% 34%
Mature Singles 7% 30%
Senior Couples 7% 27%
Senior Singles 7% 33%
High School/Trade School 8% 32%
University/College 5% 33%
Advanced University Degree 3% 25%
Undefined 6% 33%
Less than $40K 5% 29%
$40K to $80K 7% 32%
$80K Plus 7% 38%
0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50%
Enthusiast
Moderate Interest

Technical Note
See Appendix One for a description of each of the life cycle stages.

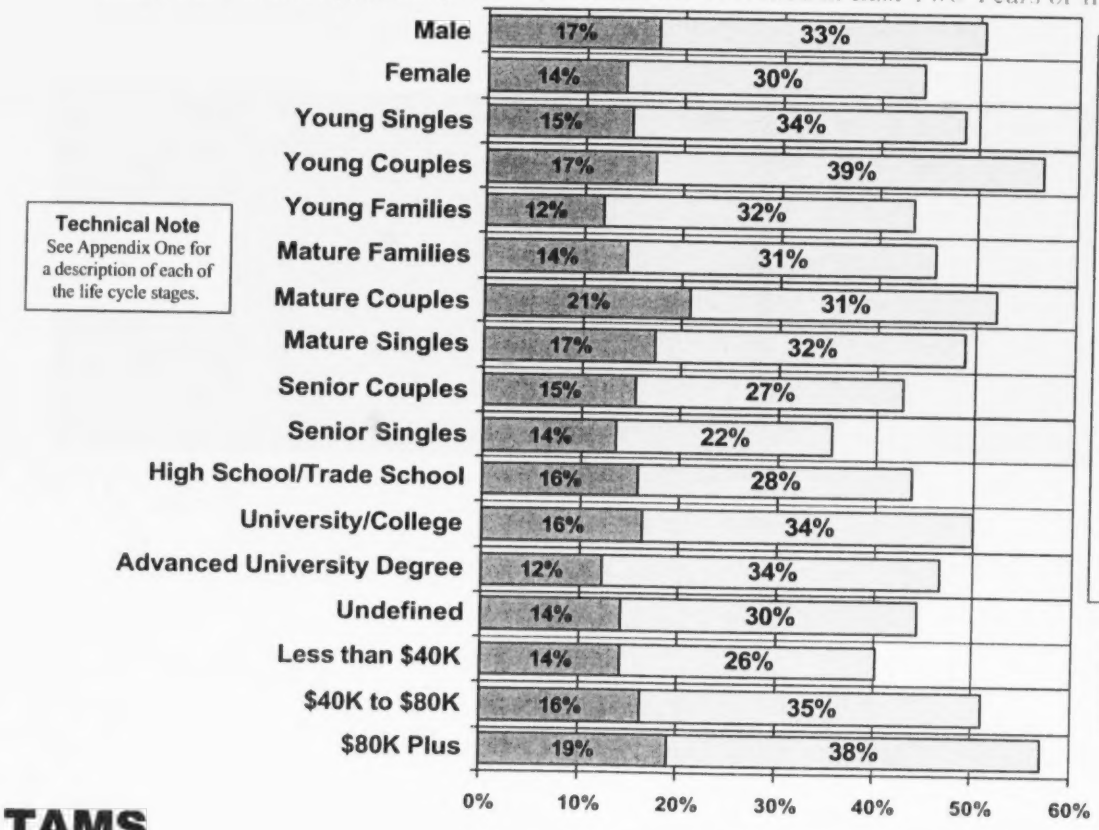
In Canada, young couples and mature couples were the most likely to exhibit an interest in casino gambling. This interest wanes among families, and especially young families. The incidence of Casino Gambling Enthusiasts declined as the level of education increased, but increased as the household income increased. This indicates that vacation packages with a casino gambling theme should be targeted at couples with higher household incomes but less formal education.

Interest in Casino Gambling

United States: By Demographics

Based on Visiting a Gambling Casino While Travelling and Not Travelling

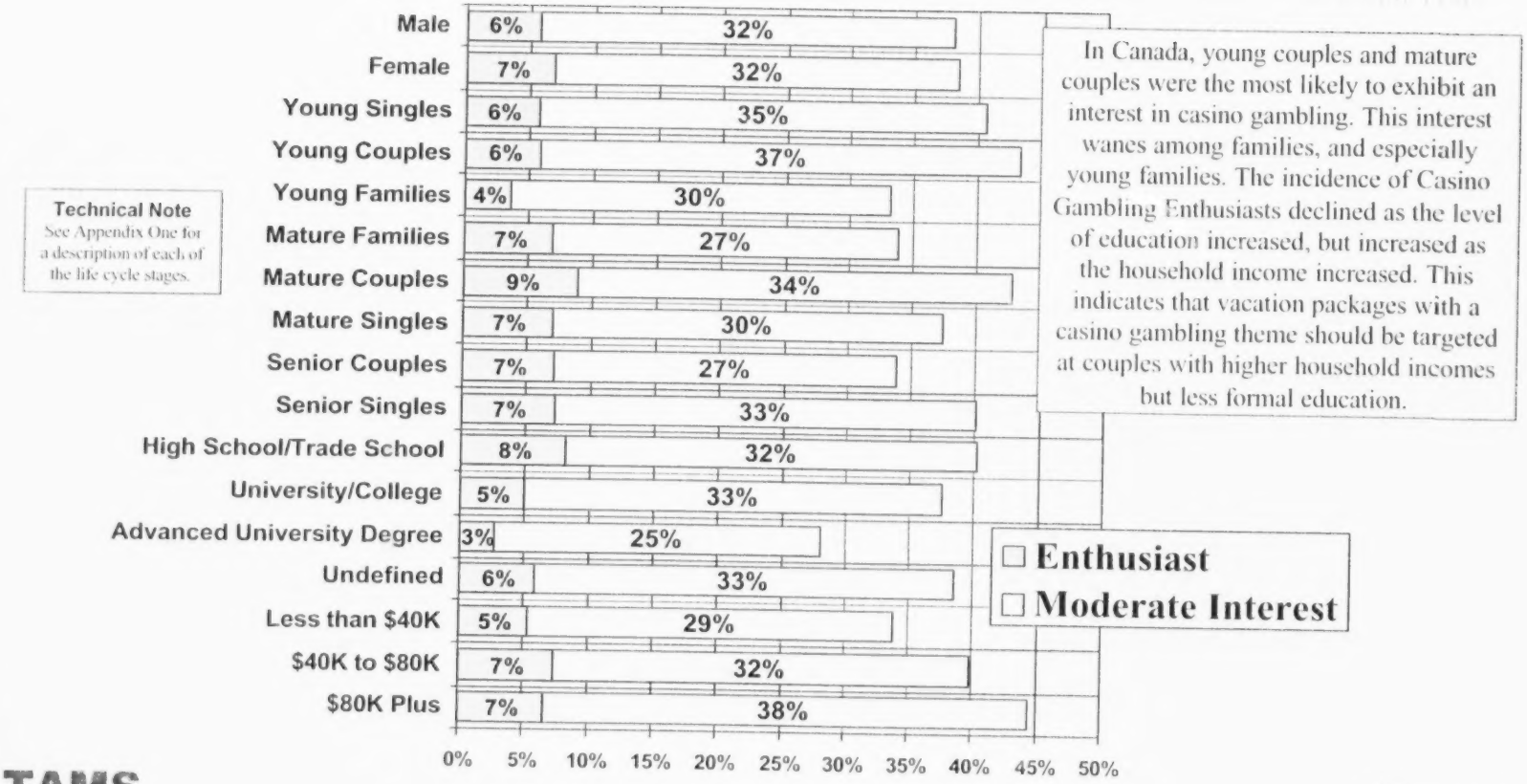
Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years


Male 17% 33%
Female 14% 30%
Young Singles 15% 34%
Young Couples 17% 39%
Young Families 12% 32%
Mature Families 14% 31%
Mature Couples 21% 31%
Mature Singles 17% 32%
Senior Couples 15% 27%
Senior Singles 14% 22%
High School/Trade School 16% 28%
University/College 16% 34%
Advanced University Degree 12% 34%
Undefined 14% 30%
Less than $40K 14% 26%
$40K to $80K 16% 35%
$80K Plus 19% 38%
0% 10% 20% 30% 40% 50% 60%

Technical Note
See Appendix One for a description of each of the life cycle stages.

The demographic profile of those interested in casino gambling in the United States was somewhat different than that observed in Canada. For example, American males were more likely than females to exhibit an interest in casino gambling. As well, those with advanced degrees exhibited a greater interest in casino gambling in the United States than in Canada. However, similar to Canada, the level of interest in casino gambling tended to increase as a function of household income and was highest among young couples and mature couples. Overall, the primary U.S. target markets for casino gambling are affluent young couples, mature singles & mature couples.

Enthusiast
Moderate Interest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Young Families 4% 30%
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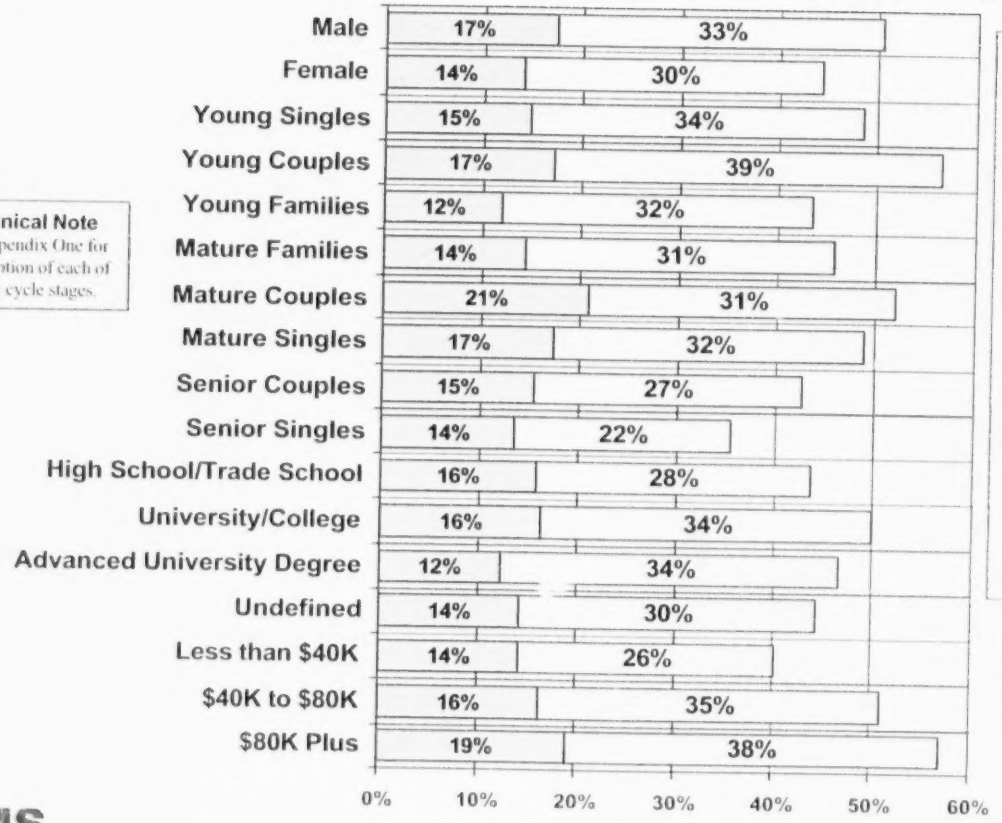
Enthusiast
Moderate Interest

Technical Note
See Appendix One for a description of each of the life cycle stages.

In Canada, young couples and mature couples were the most likely to exhibit an interest in casino gambling. This interest wanes among families, and especially young families. The incidence of Casino Gambling Enthusiasts declined as the level of education increased, but increased as the household income increased. This indicates that vacation packages with a casino gambling theme should be targeted at couples with higher household incomes but less formal education.



Technical Note
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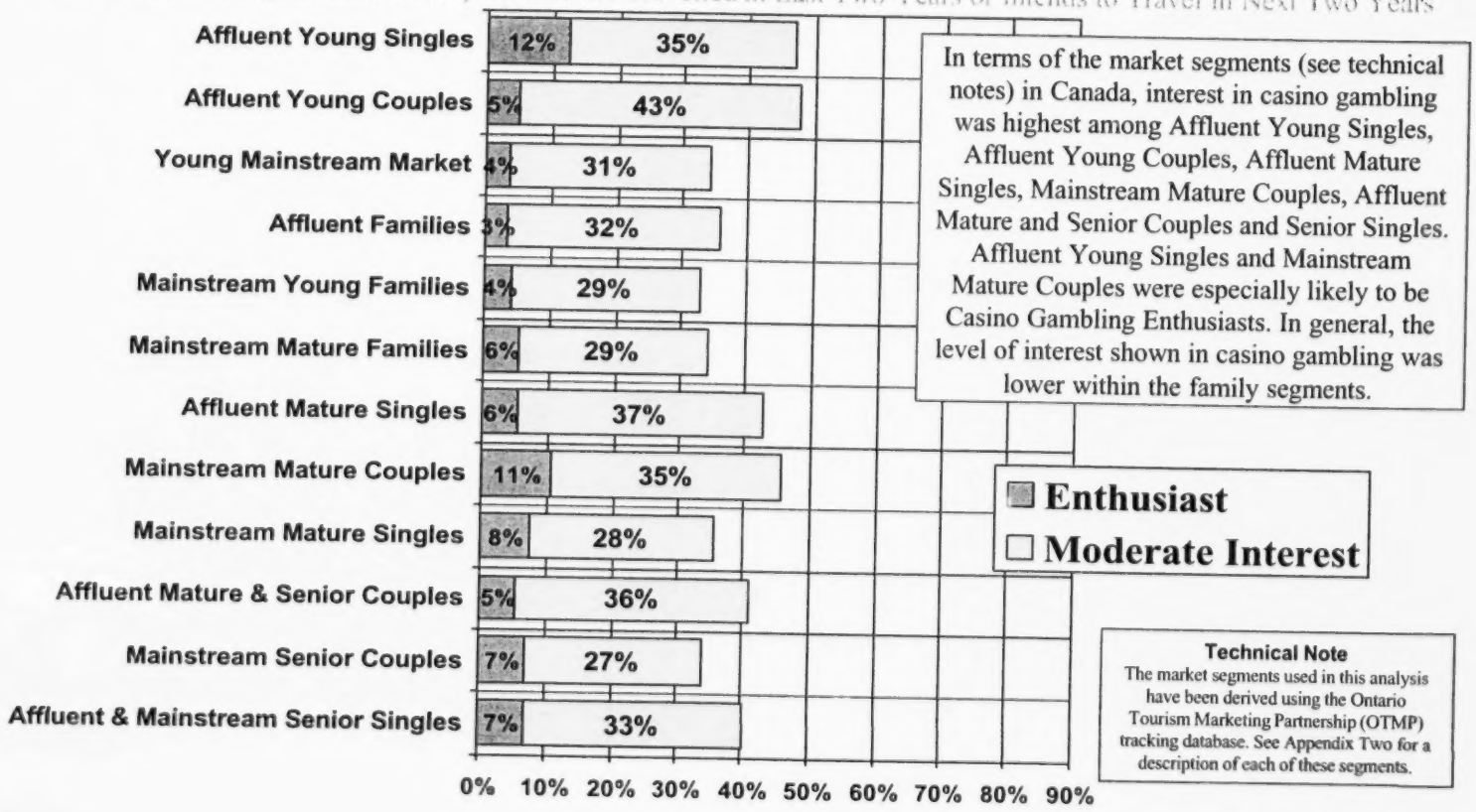
☐ **Enthusiast**
☐ **Moderate Interest**

Interest in Casino Gambling

Canada: By Market Segment

Based on Visiting a Gambling Casino While Travelling and Not Travelling

Base: Percent of Population(18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



In terms of the market segments (see technical notes) in Canada, interest in casino gambling was highest among Affluent Young Singles, Affluent Young Couples, Affluent Mature Singles, Mainstream Mature Couples, Affluent Mature and Senior Couples and Senior Singles. Affluent Young Singles and Mainstream Mature Couples were especially likely to be Casino Gambling Enthusiasts. In general, the level of interest shown in casino gambling was lower within the family segments.

Technical Note

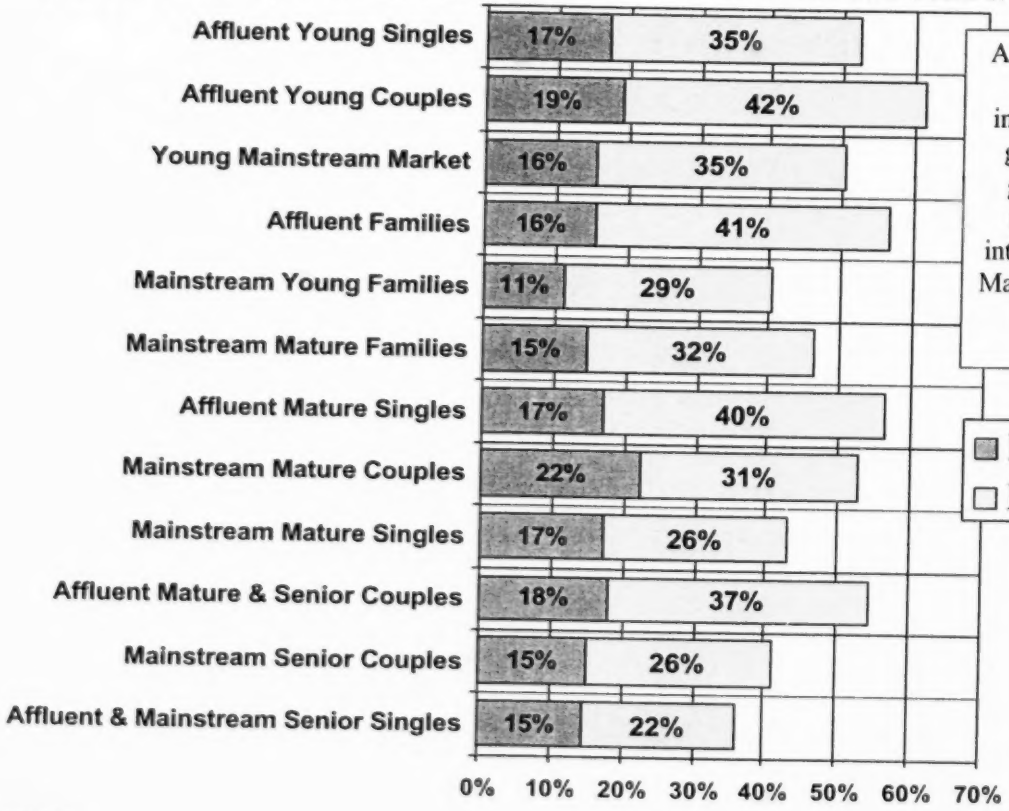
The market segments used in this analysis have been derived using the Ontario Tourism Marketing Partnership (OTMP) tracking database. See Appendix Two for a description of each of these segments.

Interest in Casino Gambling

United States: By Market Segment

Based on Visiting a Gambling Casino While Travelling and Not Travelling

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



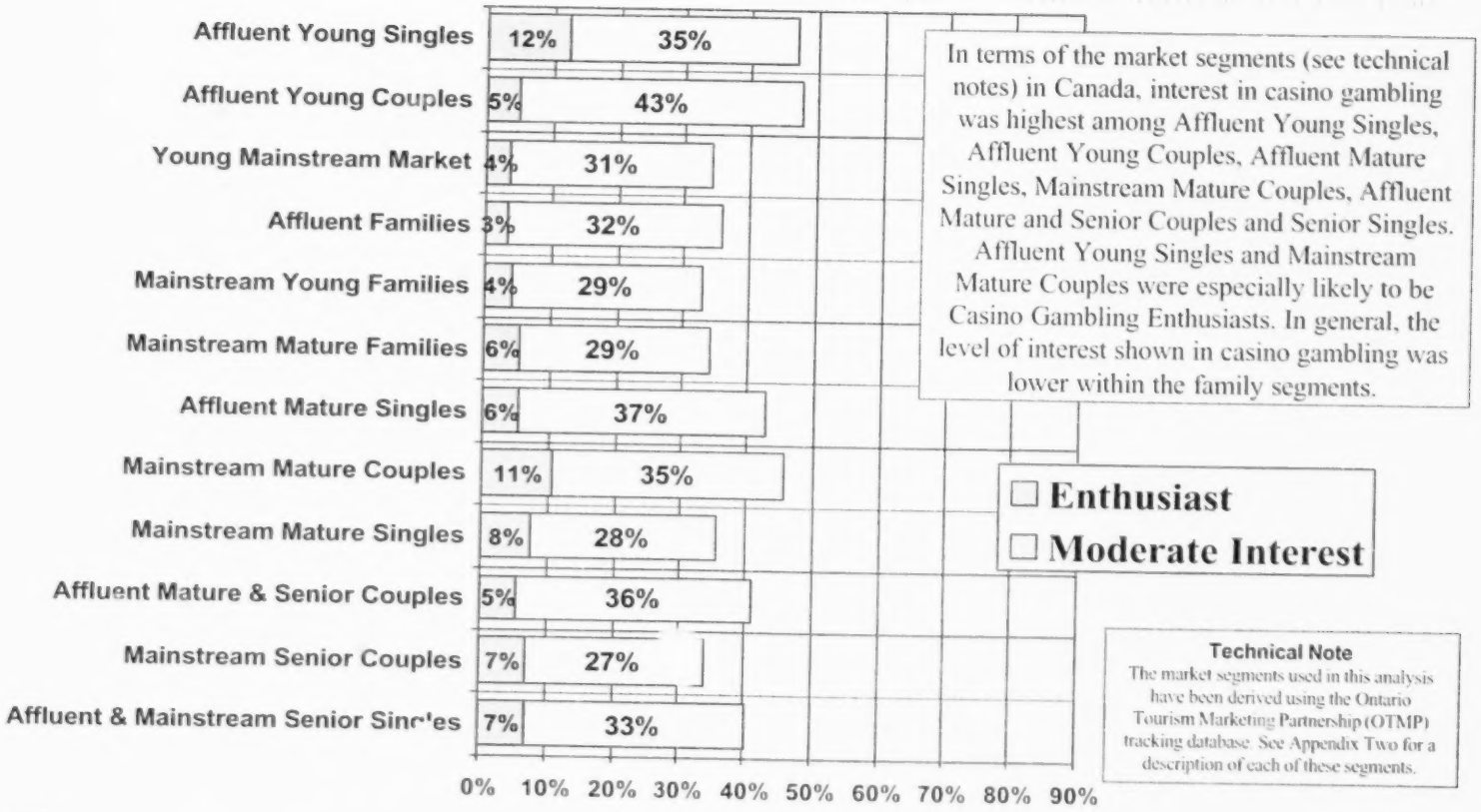
A different pattern was observed in the United States with all segments having a higher incidence of Casino Gambling Enthusiasts. In general, the five affluent segments exhibit a greater interest in casino gambling than the mainstream segments. There is also a high interest in casino gambling among Mainstream Mature Couples. These represent prime markets for casino gambling promotional activity directed at the United States.

Enthusiast

Moderate Interest

Technical Note

The market segments used in this analysis have been derived using the OTMP tracking database. See Appendix Two for a description of each of these segments.


Affluent Young Singles
12%
35%
Affluent Young Couples
5%
43%
Young Mainstream Market
4%
31%
Affluent Families
3%
32%
Mainstream Young Families
4%
29%
Mainstream Mature Families
6%
29%
Affluent Mature Singles
6%
37%
Mainstream Mature Couples
11%
35%
Mainstream Mature Singles
8%
28%
Affluent Mature & Senior Couples
5%
36%
Mainstream Senior Couples
7%
27%
Affluent & Mainstream Senior Singles
7%
33%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90%
In terms of the market segments (see technical notes) in Canada, interest in casino gambling was highest among Affluent Young Singles, Affluent Young Couples, Affluent Mature Singles, Mainstream Mature Couples, Affluent Mature and Senior Couples and Senior Singles. Affluent Young Singles and Mainstream Mature Couples were especially likely to be Casino Gambling Enthusiasts. In general, the level of interest shown in casino gambling was lower within the family segments.
Enthusiast
Moderate Interest
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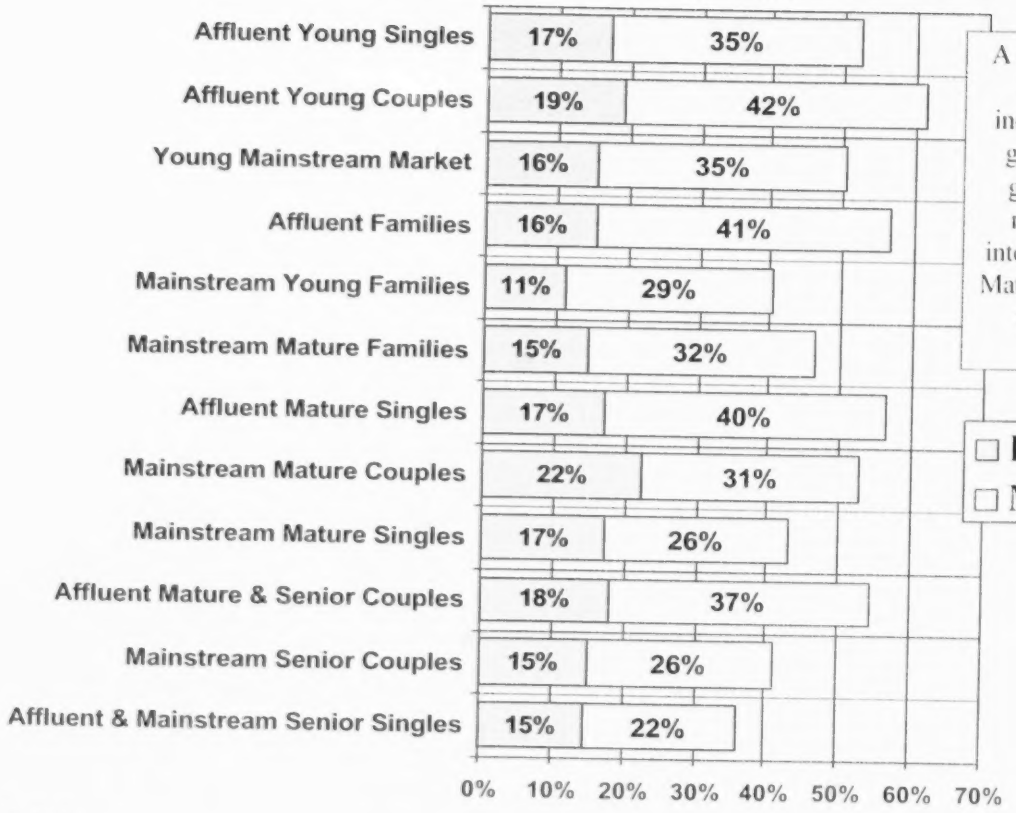
The market segments used in this analysis have been derived using the Ontario Tourism Marketing Partnership (OTMP) tracking database. See Appendix Two for a description of each of these segments.



A different pattern was observed in the United States with all segments having a higher incidence of Casino Gambling Enthusiasts. In general, the five affluent segments exhibit a greater interest in casino gambling than the mainstream segments. There is also a high interest in casino gambling among Mainstream Mature Couples. These represent prime markets for casino gambling promotional activity directed at the United States.

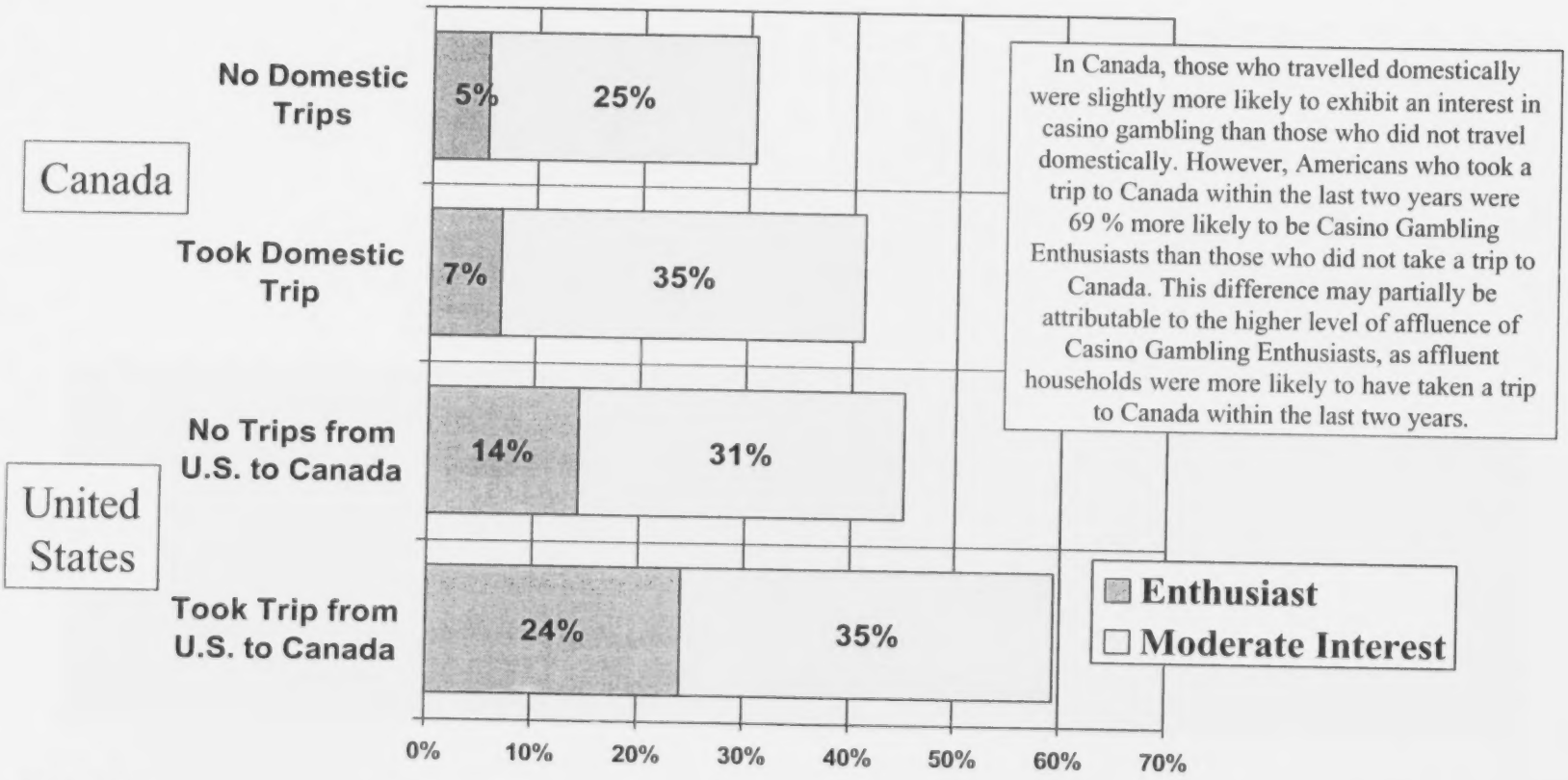
☐ **Enthusiast**
☐ **Moderate Interest**

Technical Note
The market segments used in this analysis have been derived using the OTMP tracking database. See Appendix Two for a description of each of these segments.

Interest in Casino Gambling Based on Visits to Casinos While Travelling & Not Travelling

Canada vs. U.S.: By Trips In Canada Last Two Years

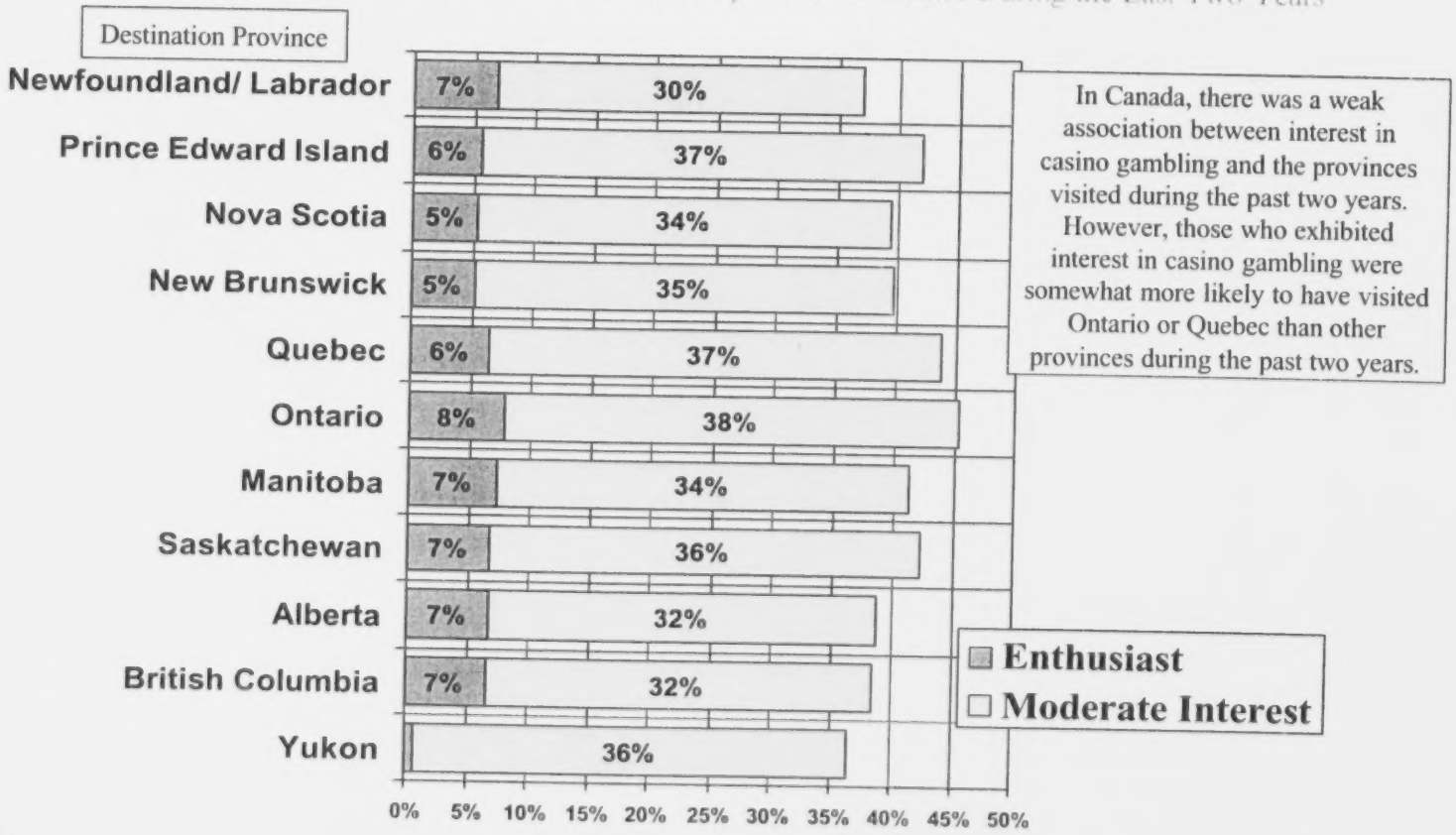
Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years


No Domestic Trips
Canada
Took Domestic Trip
No Trips from U.S. to Canada
United States
Took Trip from U.S. to Canada
5%
25%
7%
35%
14%
31%
24%
35%
0%
10%
20%
30%
40%
50%
60%
70%
Enthusiast
Moderate Interest
In Canada, those who travelled domestically were slightly more likely to exhibit an interest in casino gambling than those who did not travel domestically. However, Americans who took a trip to Canada within the last two years were 69 % more likely to be Casino Gambling Enthusiasts than those who did not take a trip to Canada. This difference may partially be attributable to the higher level of affluence of Casino Gambling Enthusiasts, as affluent households were more likely to have taken a trip to Canada within the last two years.

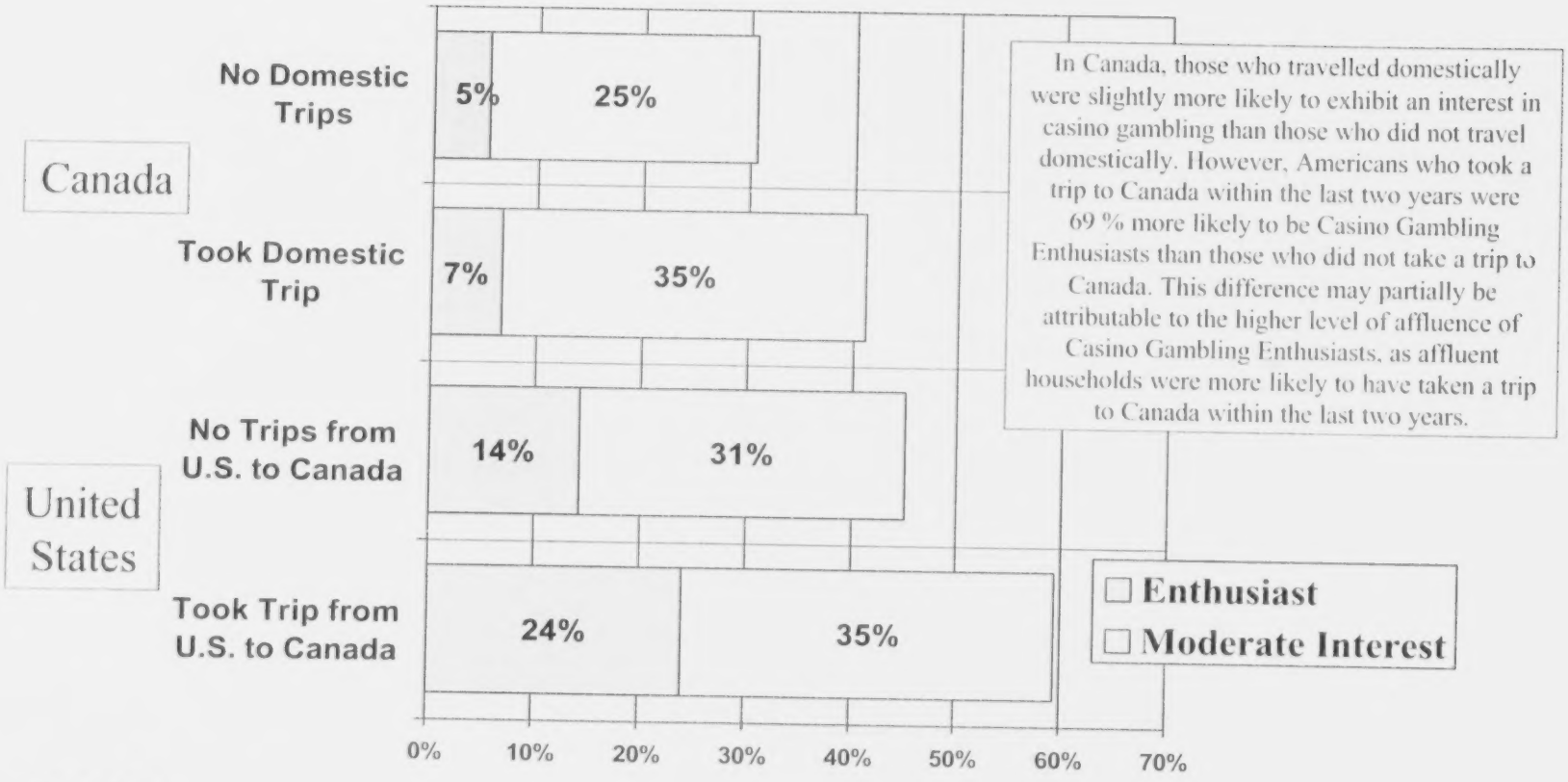
Interest in Casino Gambling Based on Visits to Casinos While Travelling & Not Travelling

Canada: Interest By Province Travelled To

Base: Percent of Population (18 Plus) Who Took a Trip to Each Province During the Last Two Years



In Canada, there was a weak association between interest in casino gambling and the provinces visited during the past two years. However, those who exhibited interest in casino gambling were somewhat more likely to have visited Ontario or Quebec than other provinces during the past two years.



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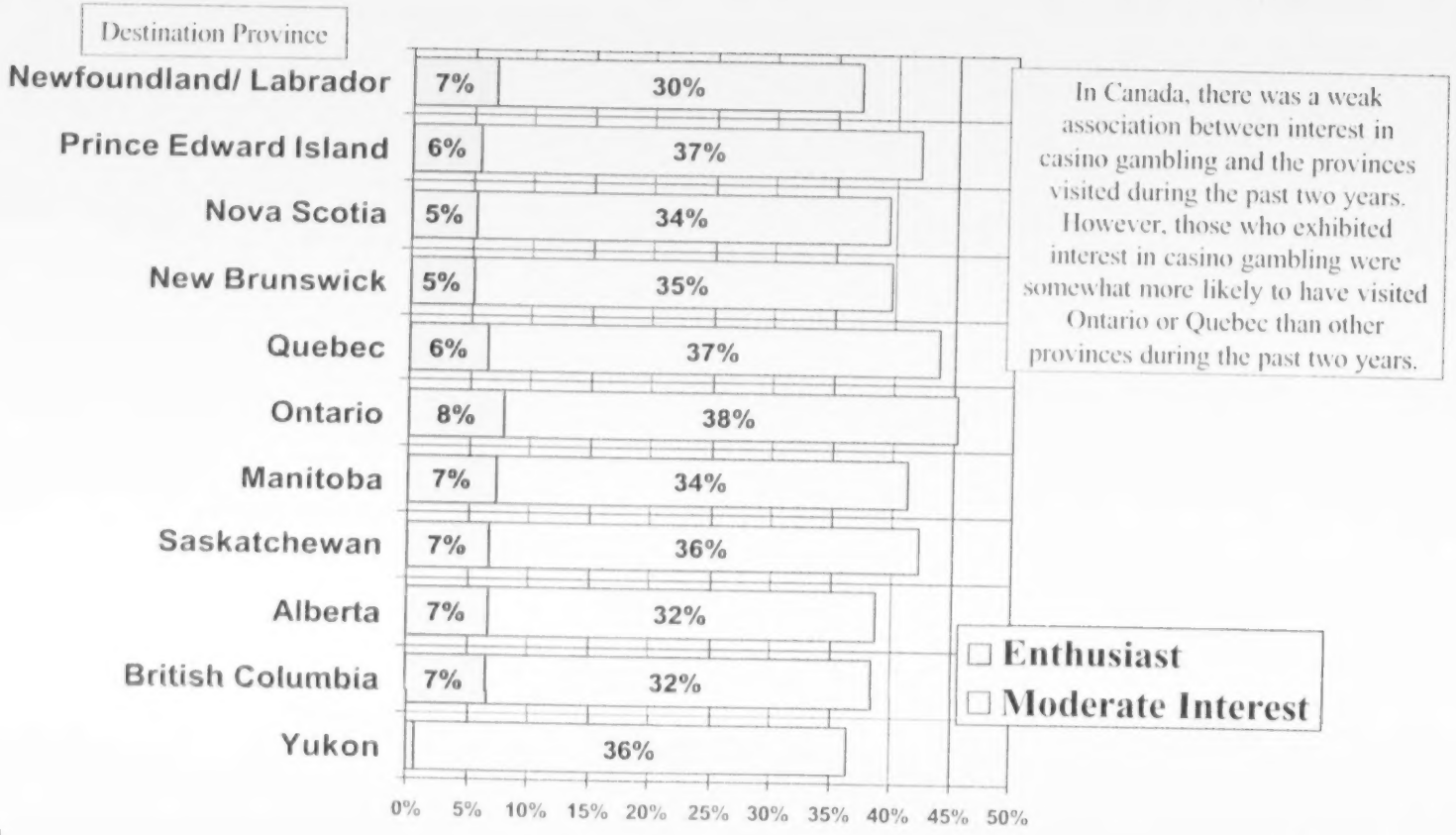
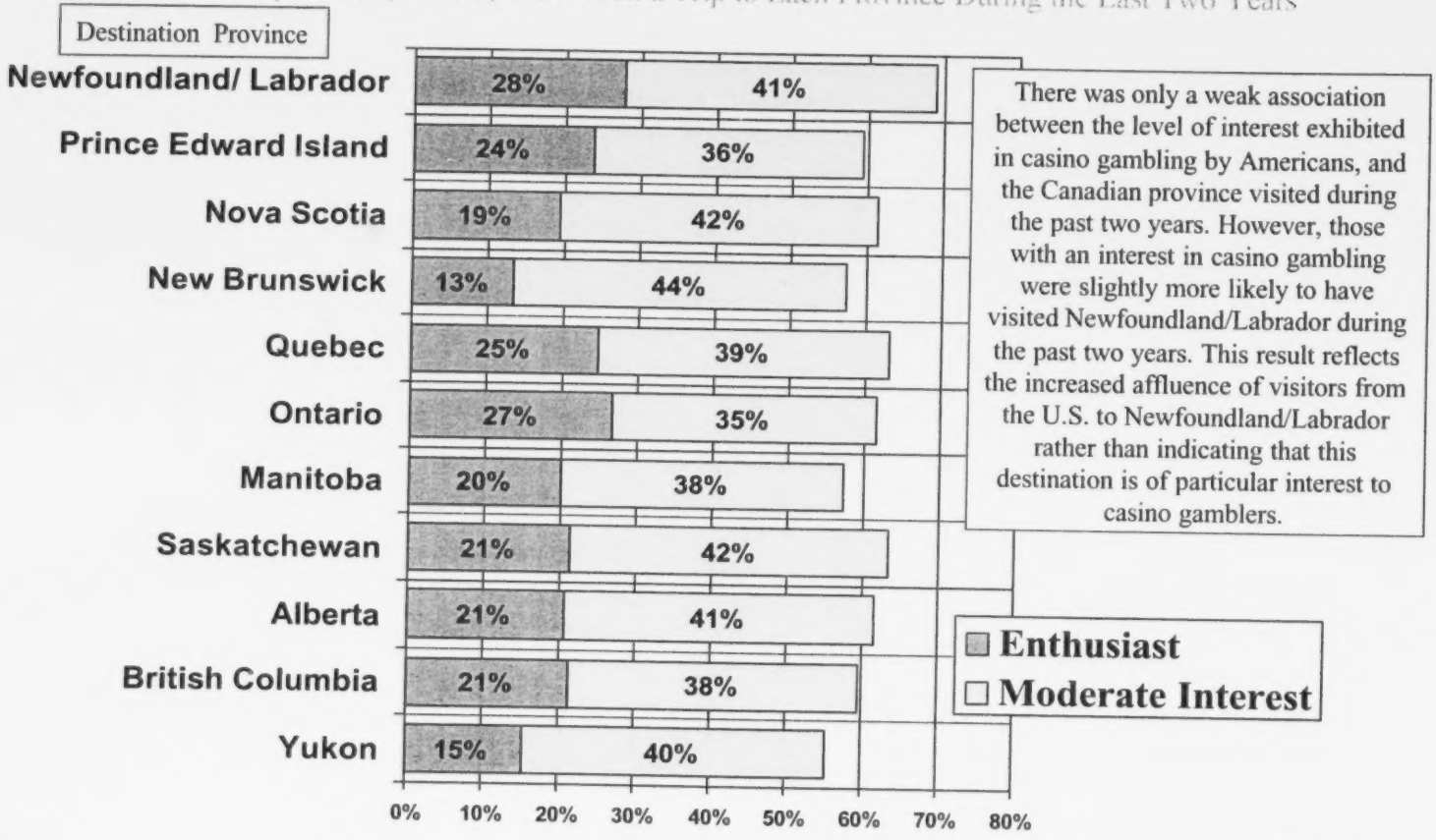


In Canada, there was a weak association between interest in casino gambling and the provinces visited during the past two years. However, those who exhibited interest in casino gambling were somewhat more likely to have visited Ontario or Quebec than other provinces during the past two years.

Interest in Casino Gambling Based on Visits to Casinos While Travelling & Not Travelling

United States: Interest By Province Travelled To

Base: Percent of Population (18 Plus) Who Took a Trip to Each Province During the Last Two Years



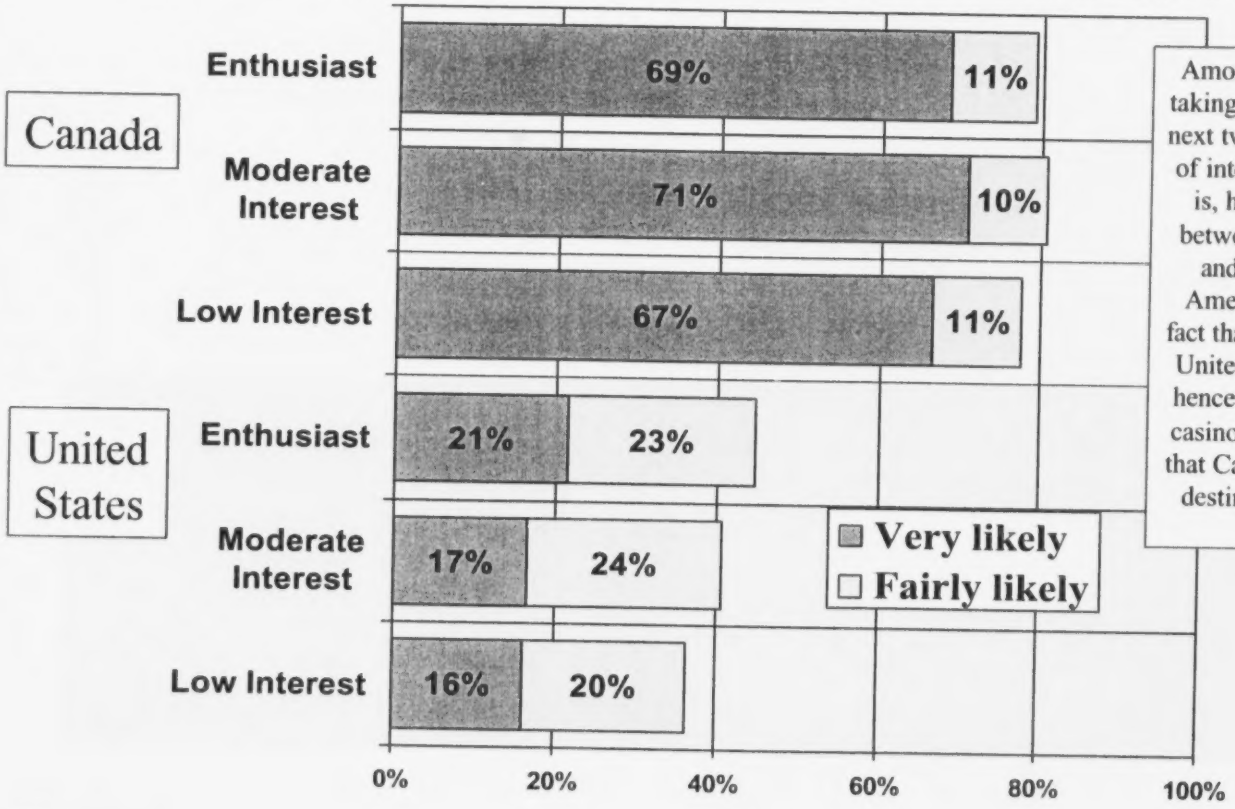
There was only a weak association between the level of interest exhibited in casino gambling by Americans, and the Canadian province visited during the past two years. However, those with an interest in casino gambling were slightly more likely to have visited Newfoundland/Labrador during the past two years. This result reflects the increased affluence of visitors from the U.S. to Newfoundland/Labrador rather than indicating that this destination is of particular interest to casino gamblers.

Interest in Casino Gambling Based on Visits to a Casino While Travelling & Not Travelling

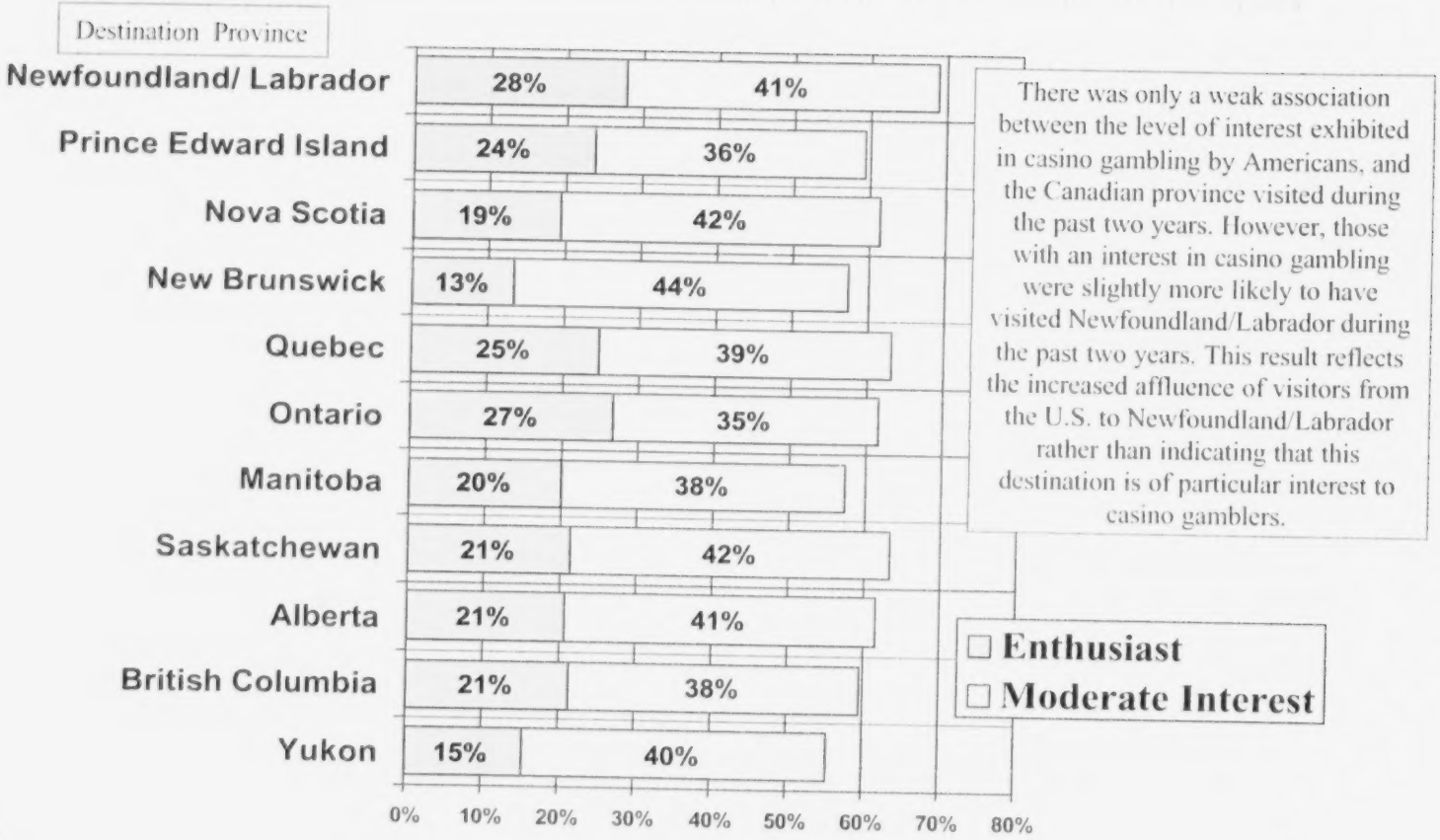
Intentions to Travel to Canada in Next Two Years

Interest in Casino Gambling By Intentions to Travel in Canada During Next Two Years

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



Among Canadians, the likelihood of taking a trip within Canada during the next two years is unrelated to the level of interest in casino gambling. There is, however, a modest association between interest in casino gambling and travelling to Canada among Americans. This likely reflects the fact that travellers to Canada from the United States are more affluent (and hence more likely to be interested in casino gambling) rather than the fact that Canada is an especially attractive destination for people interested in casino gambling.



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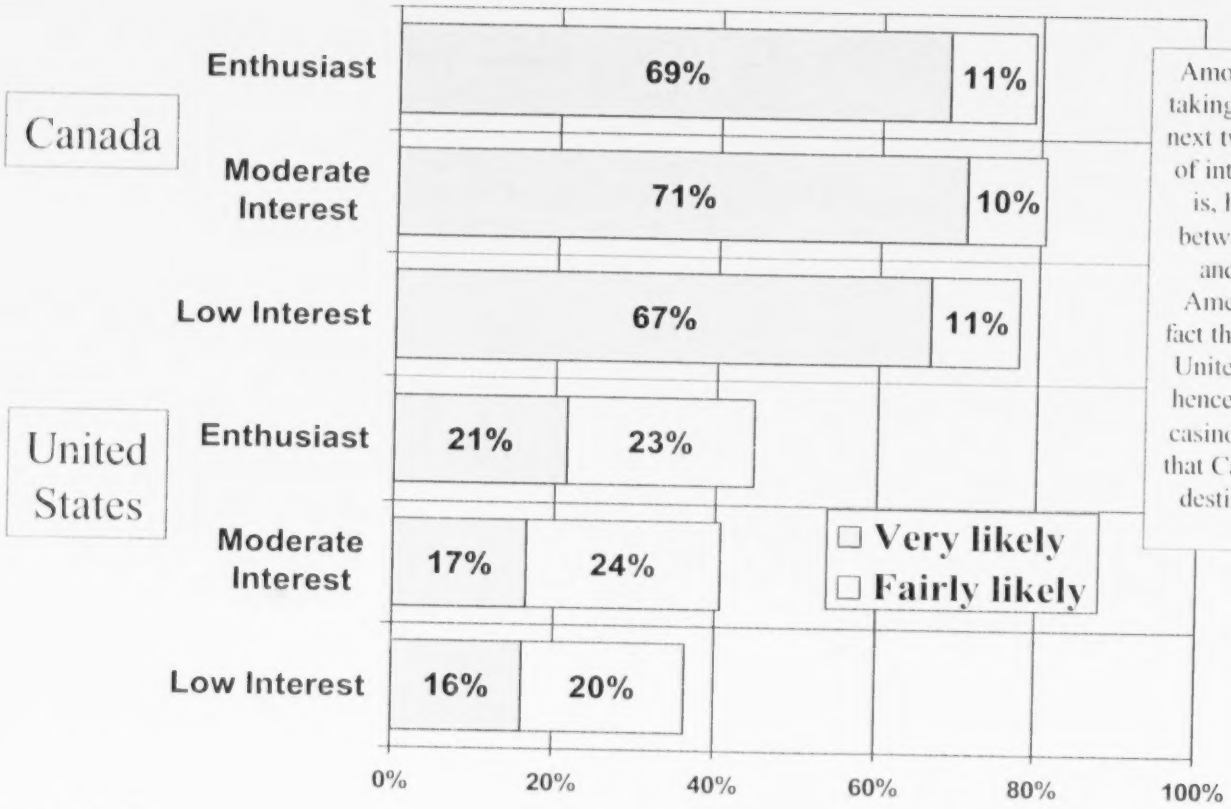
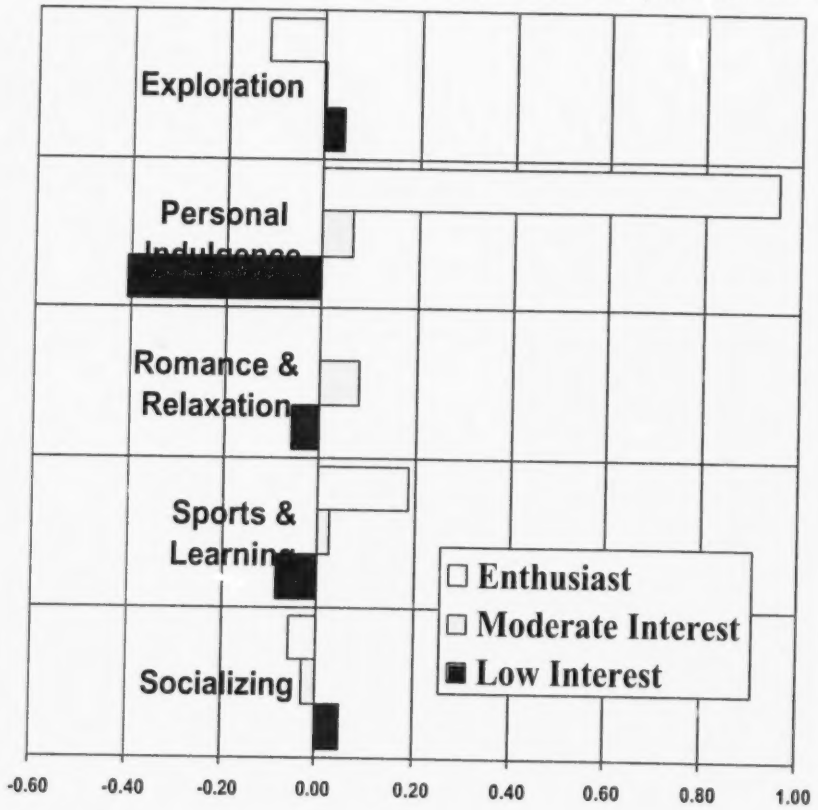


Among Canadians, the likelihood of taking a trip within Canada during the next two years is unrelated to the level of interest in casino gambling. There is, however, a modest association between interest in casino gambling and travelling to Canada among Americans. This likely reflects the fact that travellers to Canada from the United States are more affluent (and hence more likely to be interested in casino gambling) rather than the fact that Canada is an especially attractive destination for people interested in casino gambling.

General Vacation Experiences Sought During Pleasure Travel in the Past Two Years

By Interest in Casino Gambling Based on Visits to Casinos While Travelling & Not Travelling
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Casino Gambling Enthusiasts were more likely to have sought out vacation experiences associated with personal indulgence (e.g., to experience the good life, visiting a casino, experiencing city life such as nightlife). They were somewhat more likely to have pursued sports and learning vacation experiences (e.g., to participate in a hobby or sport). Advertising and promotional materials designed to promote casino gambling-related tourism should emphasize the opportunities for entertainment and personal indulgence offered by the destination.

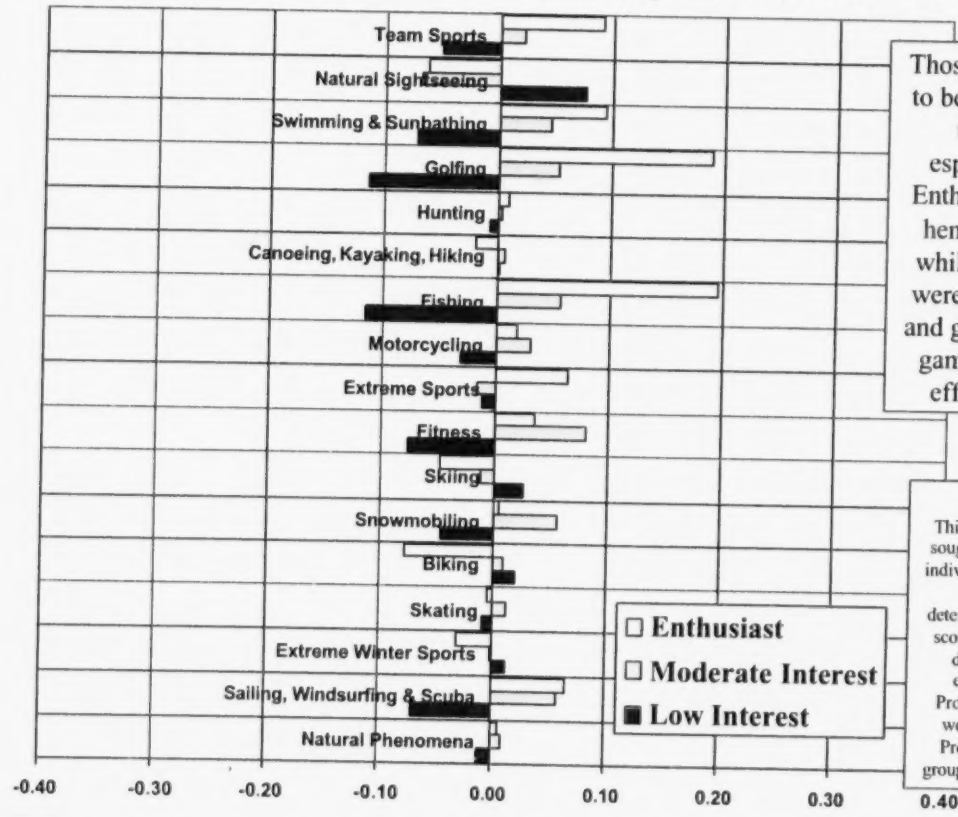
Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past Two Years

By Interest in Casino Gambling Based on Visits to Casinos While Travelling & Not Travelling

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



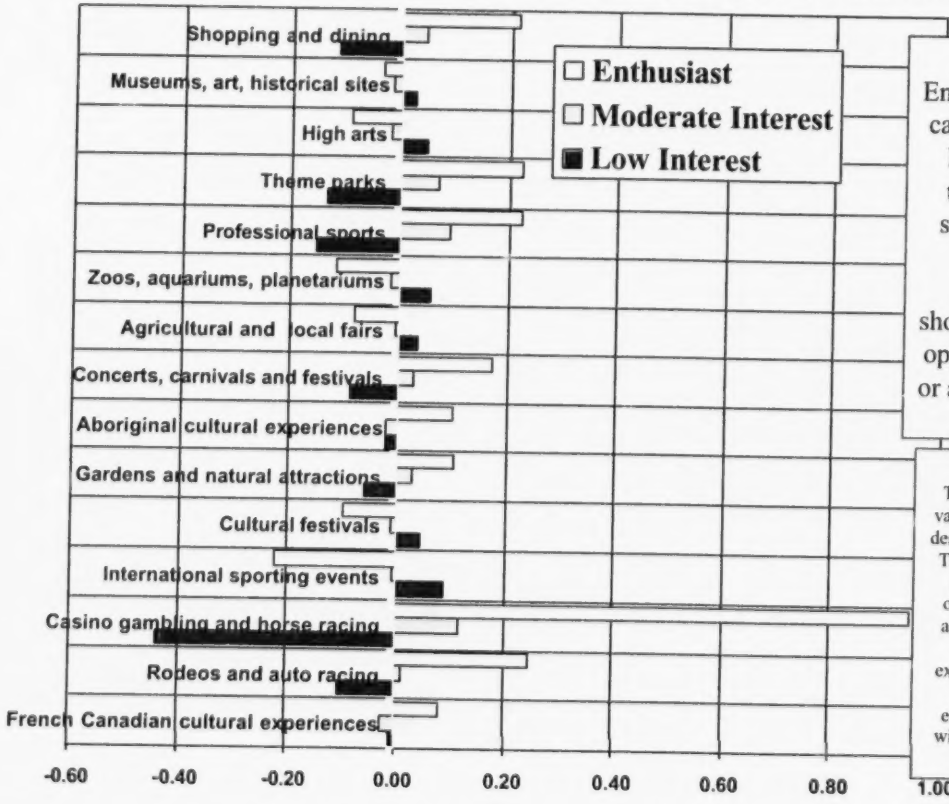
Those with an interest in casino gambling tended to be more active in most outdoor activities than those who were not interested. This was especially apparent among Casino Gambling Enthusiasts, who tended to be more affluent and hence more likely to pursue outdoor activities while travelling. Casino Gambling Enthusiasts were especially likely to be interested in fishing and golfing. Combining these activities in casino gambling tourism packages may be especially effective, particularly for affluent travellers.

Technical Note

This analysis is based on a factor analysis of the outdoor vacat ion activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past Two Years

By Interest in Casino Gambling Based on Visits to Casinos While Travelling & Not Travelling
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



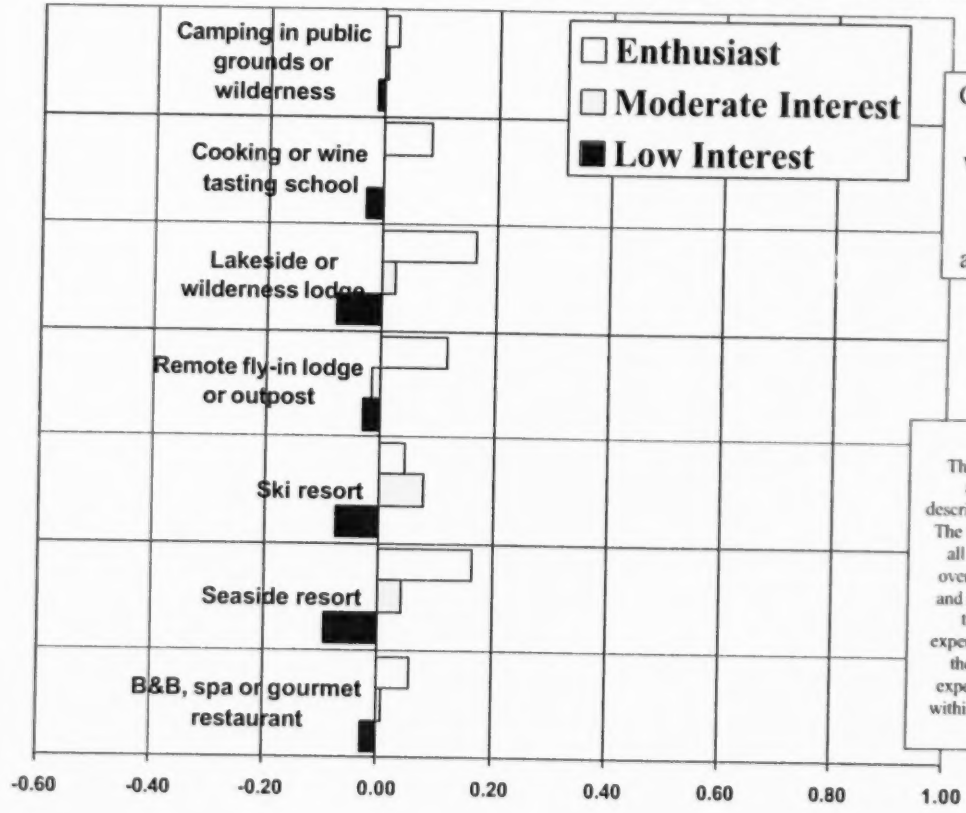
As would be expected, Casino Gambling Enthusiasts were much more likely to have visited a casino or a racetrack than those with a moderate or low interest in casino gambling (Note: Some of these items were used in the construction of the scale). Enthusiasts were also more likely to have attended an auto racing event or rodeo, a professional sports event, participated in shopping/dining or visited a theme park. Combining opportunities to gamble together with sports events or a shopping/dining experience may be particularly appealing to Casino Gambling Enthusiasts.

Technical Note

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Accommodation-Related Activities Sought During Pleasure Travel in the Past Two Years

By Interest in Casino Gambling Based on Visits to Casinos While Travelling & Not Travelling
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Casino Gambling Enthusiasts were more likely to have stayed in a seaside resort, a lakeside wilderness lodge or a remote fly-in lodge than those with less interest in casino gambling. This pattern likely reflects the relative affluence of the Casino Gambling Enthusiasts.

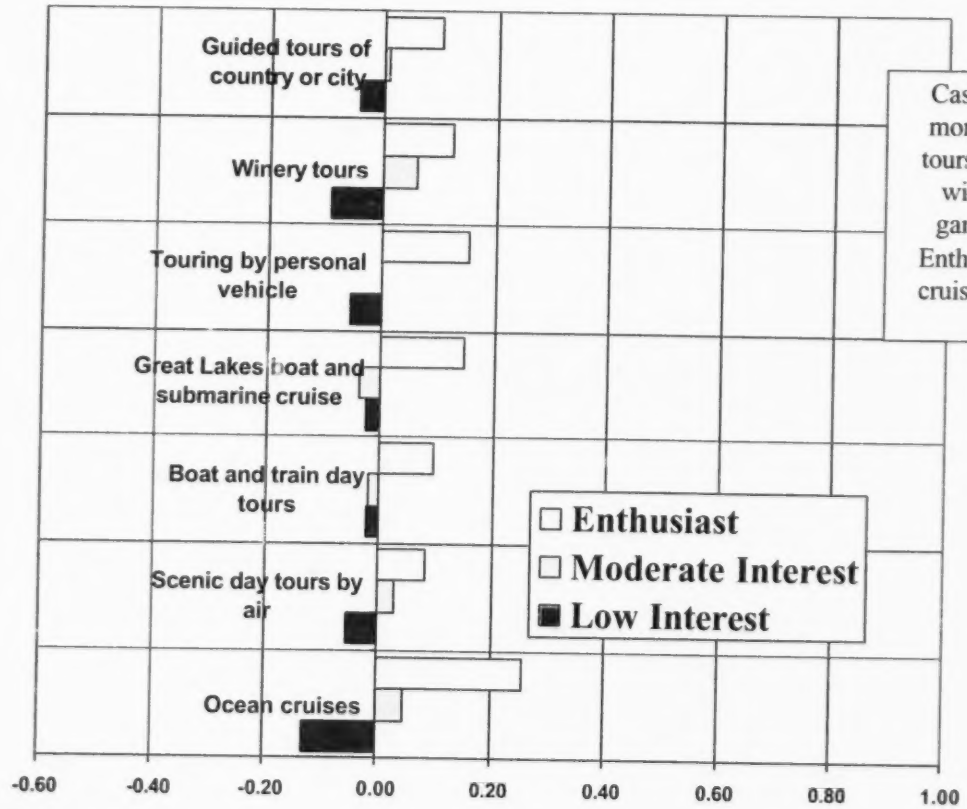
Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Day and Overnight Touring Activities in the Past Two Years

By Interest in Casino Gambling Based on Visits to Casinos While Travelling & Not Travelling

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Casino Gambling Enthusiasts were slightly more likely to have taken all seven types of tours in the last two years compared to those with a moderate or low interest in casino gambling. In particular, Casino Gambling Enthusiasts are likely to have taken an ocean cruise, which usually offers opportunities for casino gambling.

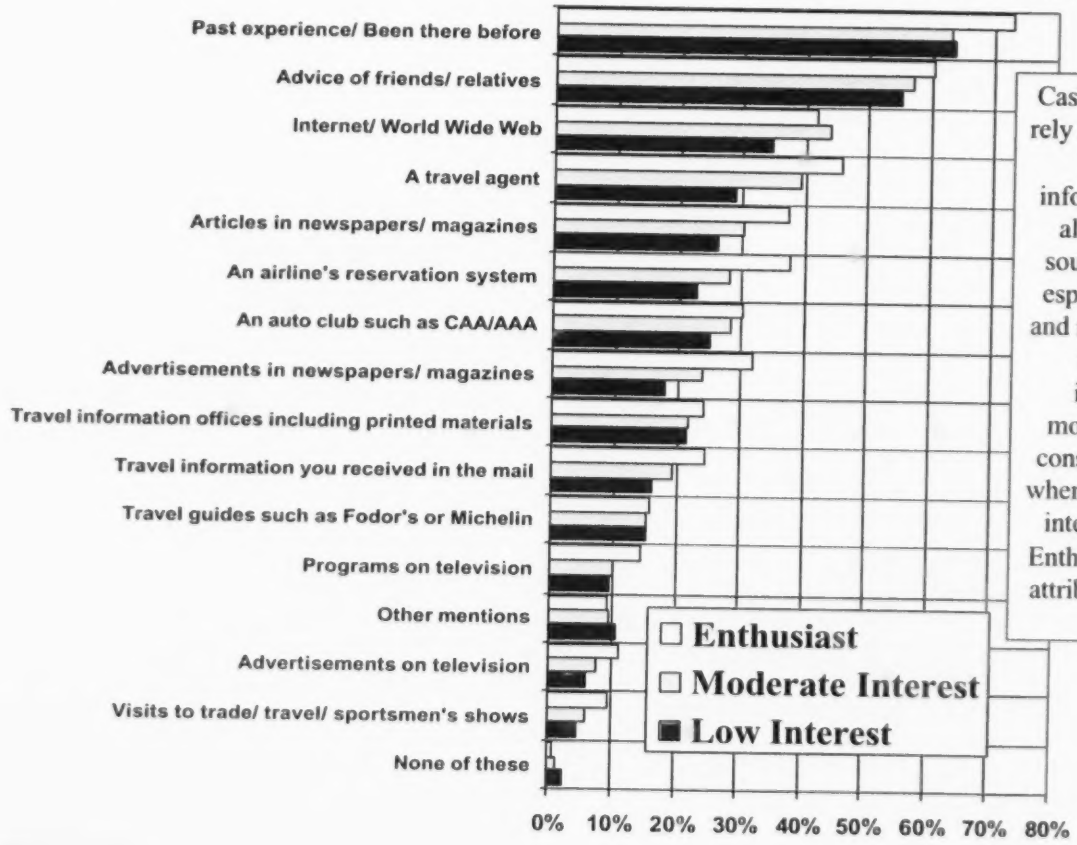
Technical Note

This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Sources of Information Consulted to Plan Brief Vacations

By Interest in Casino Gambling Based on Visits to Casinos While Travelling & Not Travelling

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

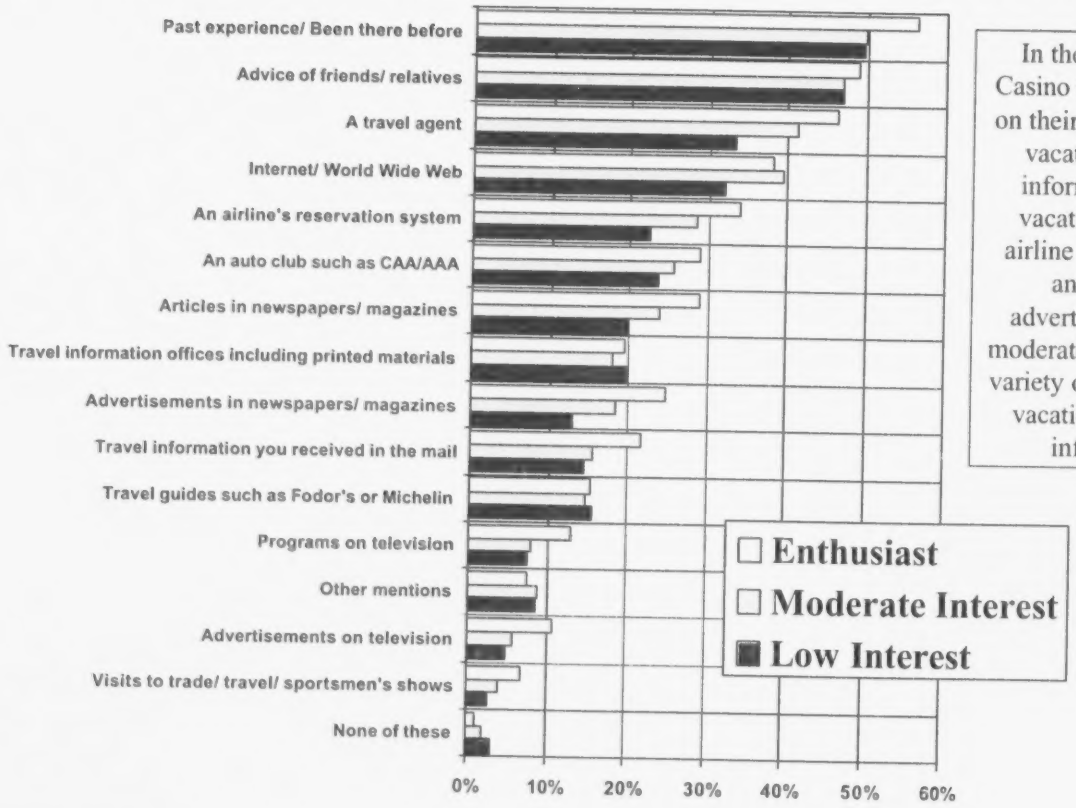


Casino Gambling Enthusiasts were more likely to rely on their past travel experience or the advice of family and friends than other sources of information when planning brief vacations. They also consulted a larger variety of information sources when planning their brief vacations and especially travel agents, the Internet, newspaper and magazine articles, airline reservation systems, newspaper and magazine advertising and information from auto clubs. Those with a moderate interest in casino gambling generally consulted a larger variety of information sources when planning brief vacations than those with low interest, but fewer information sources than the Enthusiasts. Once again, this pattern was partially attributable to the relative affluence of the Casino Gambling Enthusiasts.

Sources of Information Consulted to Plan Longer Vacations

By Interest in Casino Gambling Based on Visits to Casinos While Travelling & Not Travelling

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

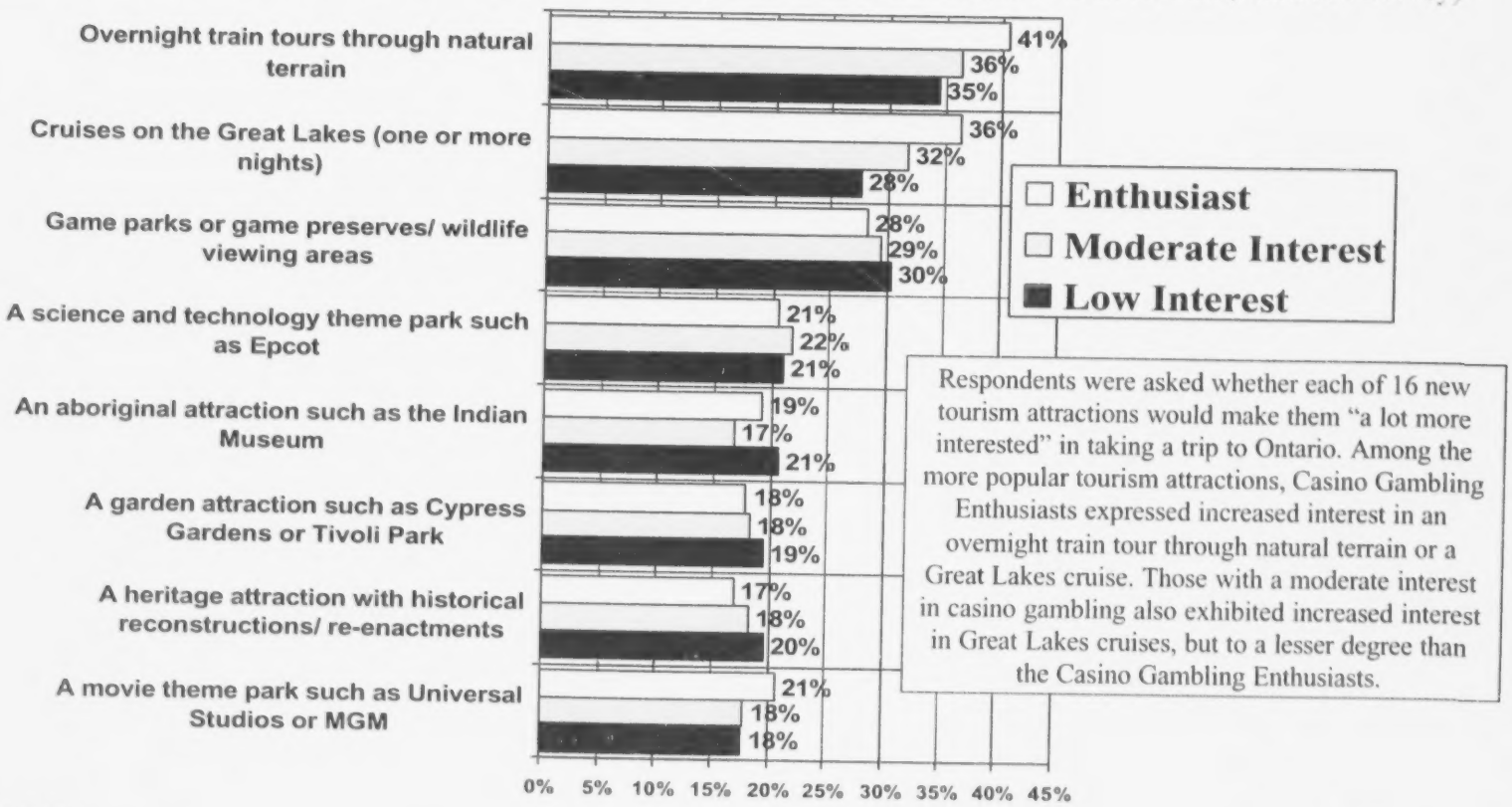


In the same manner as planning brief vacations, Casino Gambling Enthusiasts are more likely to rely on their past travel experience when planning longer vacations. They also consult a larger variety of information sources when planning their longer vacations--especially travel agents, the Internet, airline reservation systems, auto club information, and newspaper and magazine articles and advertising. As with brief vacations, those with a moderate interest in casino gambling consult a larger variety of information sources when planning longer vacations than those with low interest, but fewer information sources than the Enthusiasts.

Interest in New Tourism Products

By Interest in Casino Gambling (Part One of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

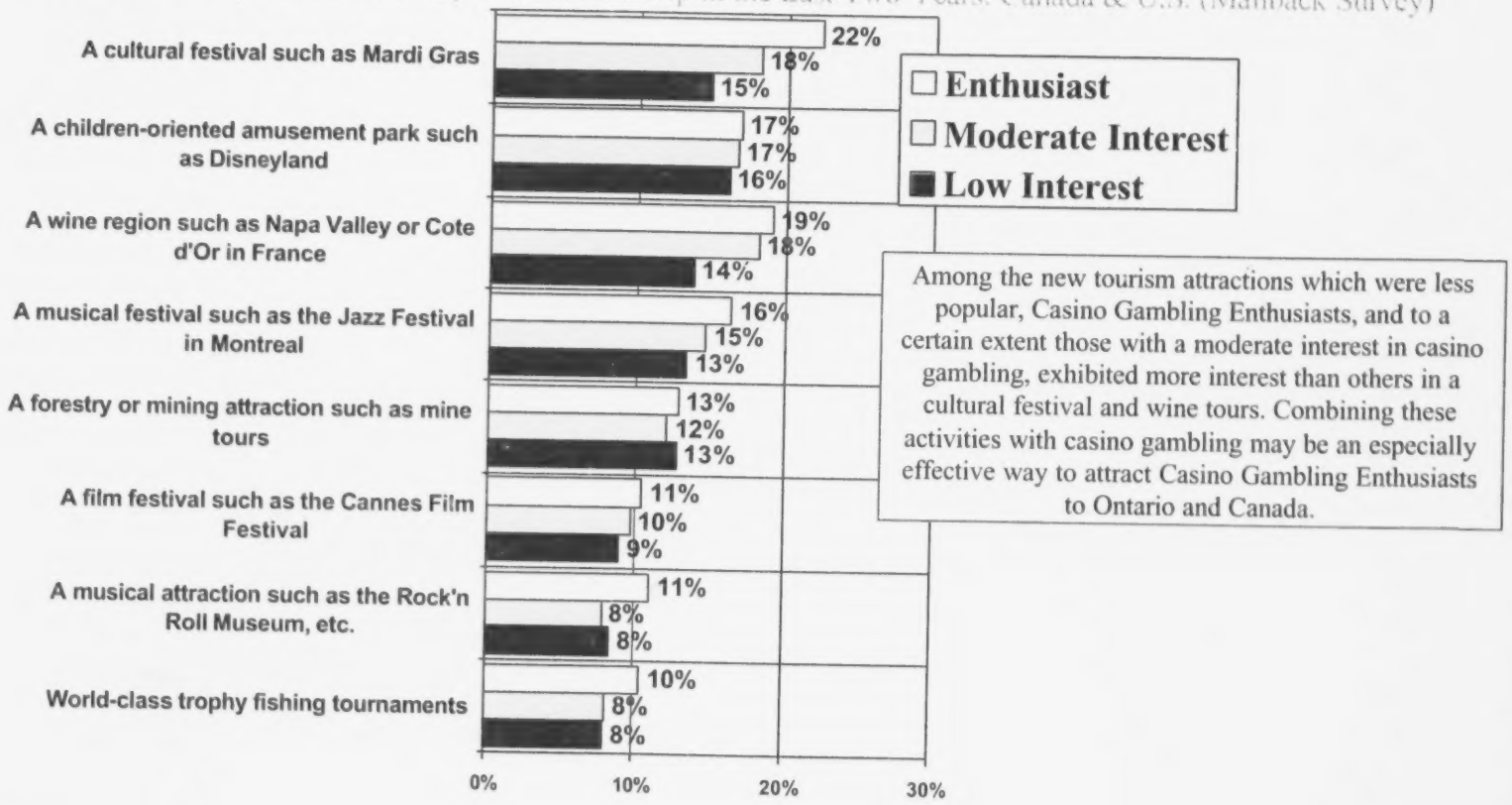


Respondents were asked whether each of 16 new tourism attractions would make them "a lot more interested" in taking a trip to Ontario. Among the more popular tourism attractions, Casino Gambling Enthusiasts expressed increased interest in an overnight train tour through natural terrain or a Great Lakes cruise. Those with a moderate interest in casino gambling also exhibited increased interest in Great Lakes cruises, but to a lesser degree than the Casino Gambling Enthusiasts.

Interest in New Tourism Products

By Interest in Casino Gambling (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Among the new tourism attractions which were less popular, Casino Gambling Enthusiasts, and to a certain extent those with a moderate interest in casino gambling, exhibited more interest than others in a cultural festival and wine tours. Combining these activities with casino gambling may be an especially effective way to attract Casino Gambling Enthusiasts to Ontario and Canada.

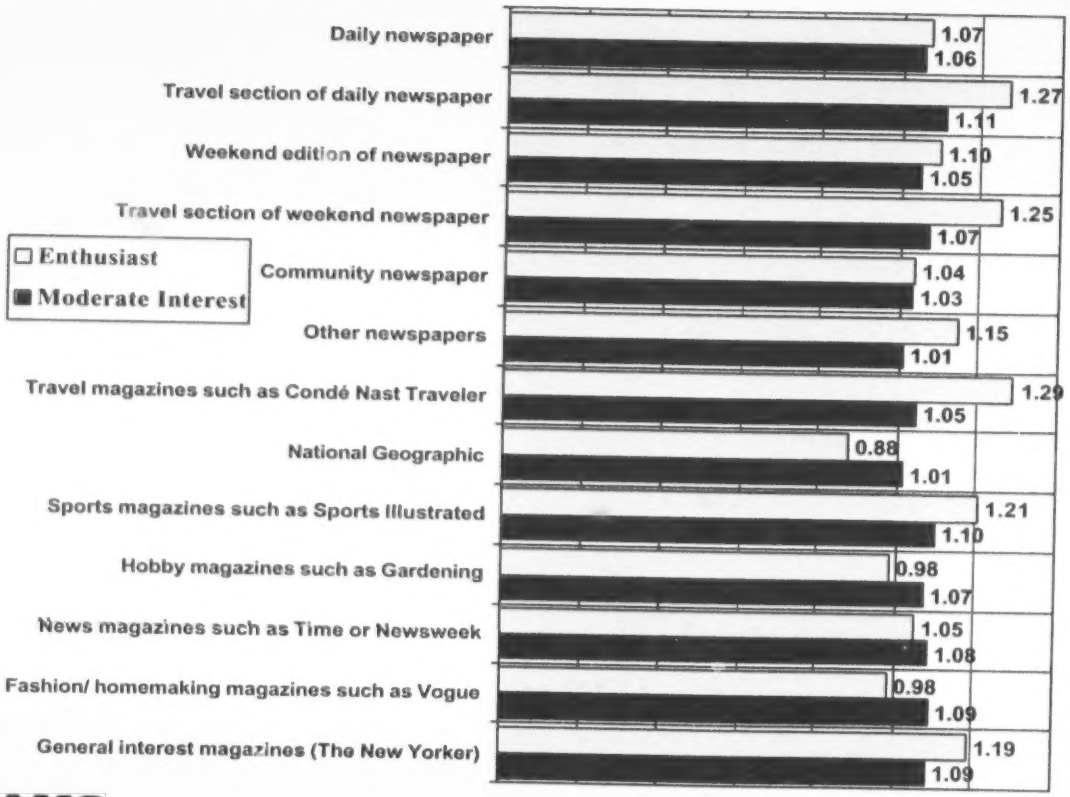
Media Index for Print Media: Canada & United States

By Interest in Casino Gambling While Travelling & Not Travelling

Percent Reading Each Publication Type Among Those With an Interest in Casino Gambling

By Percent Reading Each Type of Publication in General Market

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media indexing for various types of print media (see Technical Note below) suggests that the travel section of their daily or weekend newspapers and travel magazines are the most efficient channels to reach Casino Gambling Enthusiasts. Enthusiasts are also more likely to read sports magazines and general interest magazines. Those with a moderate interest in casino gambling are also more likely to read sports magazines and the travel section of their daily newspaper.

Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that people who were very interested in casino gambling were 20 % more likely to read a particular publication than the general adult population.

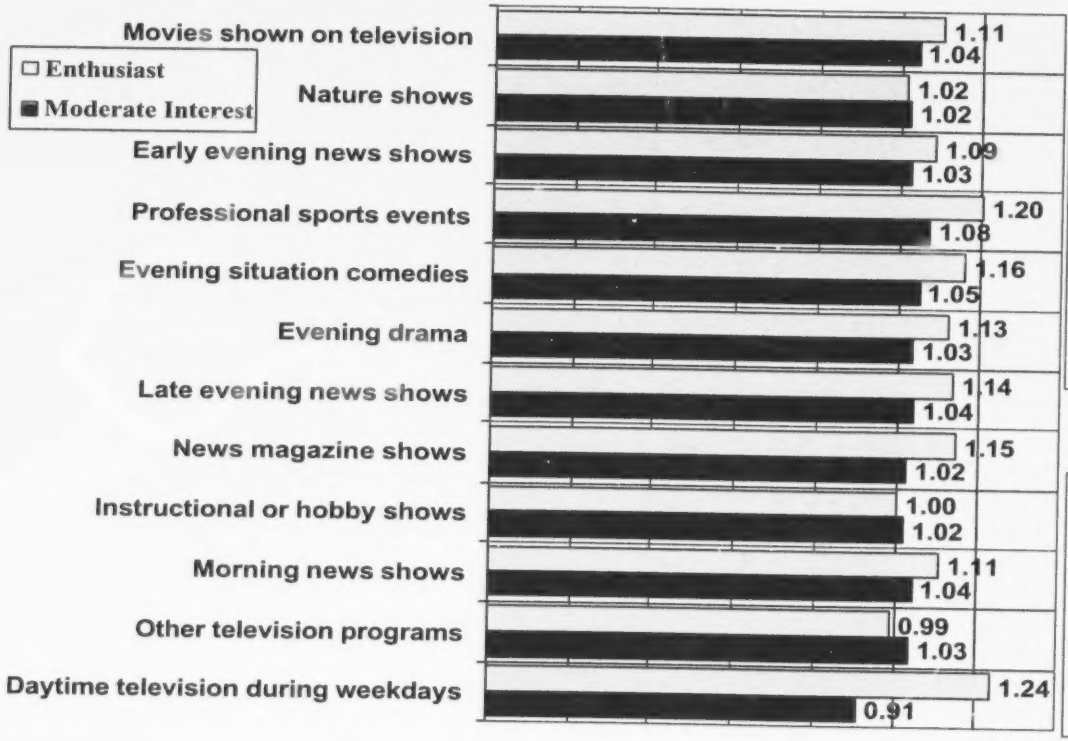
Media Index for Television Programs: Canada & United States

By Interest in Casino Gambling While Travelling & Not Travelling

Percent Reading Each Publication Type Among Those With an Interest in Casino Gambling

By Percent Reading Each Type of Publication in General Market

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



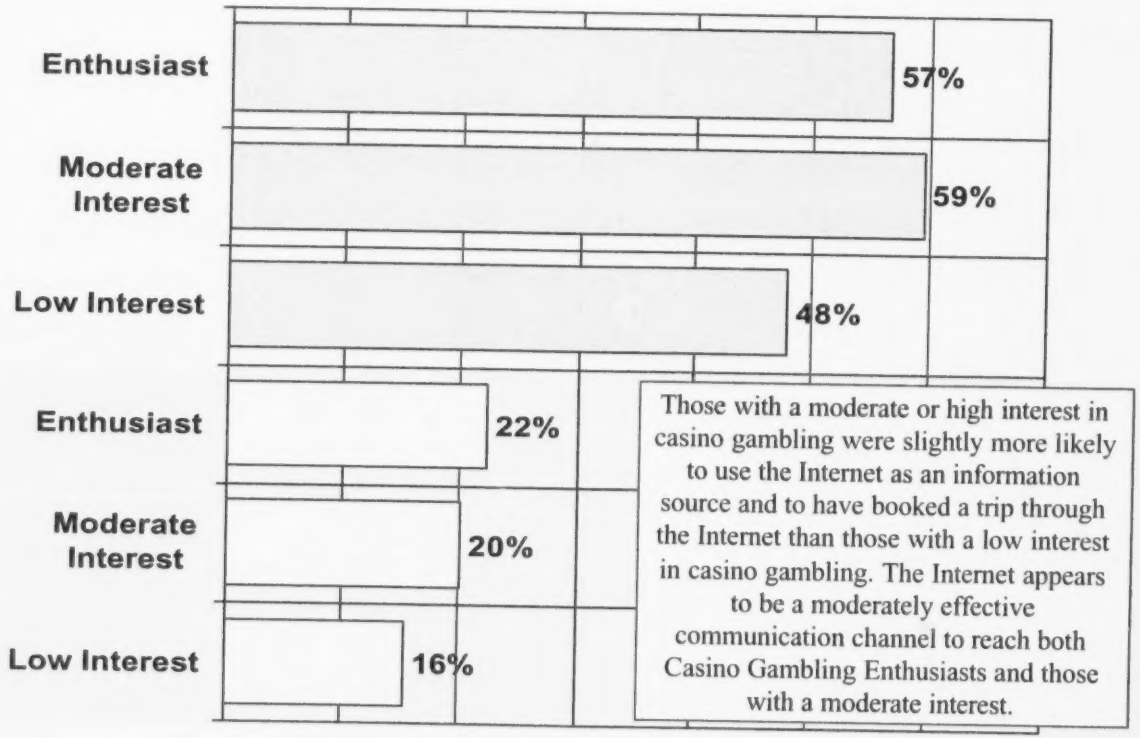
Casino Gambling Enthusiasts were more likely to watch weekday daytime television and television sports programming. This programming represents the most efficient way to reach this target market. Enthusiasts were also more likely to watch late evening news, news magazines and evening sitcoms and drama programming than those with a moderate interest in casino gambling.

Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in casino gambling were 20 % more likely to read a particular publication than the general adult population.

Percent Using Internet and Booking At Least One Trip Using the Internet
By Interest in Casino Gambling

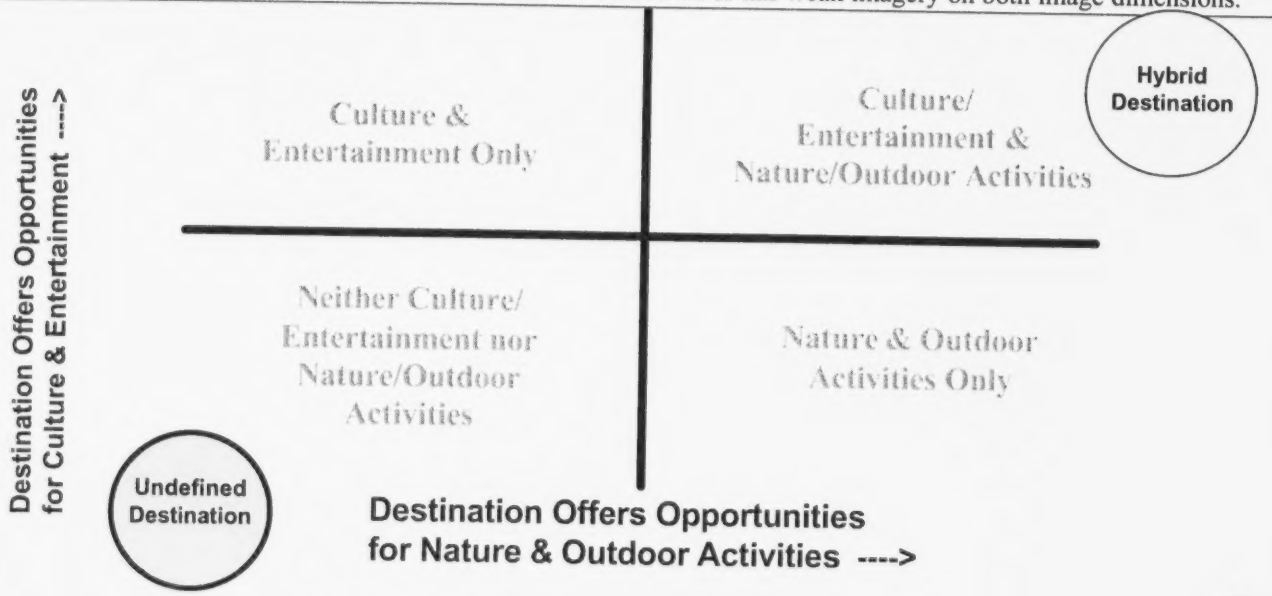
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)


Enthusiast
57%
Moderate Interest
59%
Low Interest
48%
Enthusiast
22%
Moderate Interest
20%
Low Interest
16%
Those with a moderate or high interest in casino gambling were slightly more likely to use the Internet as an information source and to have booked a trip through the Internet than those with a low interest in casino gambling. The Internet appears to be a moderately effective communication channel to reach both Casino Gambling Enthusiasts and those with a moderate interest.
Uses Internet For Research (Any Topic)
Booked Trip Using Internet (Last Two Years)

Destination Image Mapping

- Technical Explanation -

Respondents were asked to assess the image of Canada and Ontario on a 10-point rating scale for 25 image attributes. These ratings were factor analysed to identify general image dimensions upon which Canada and Ontario were evaluated (See Appendix Eight for more details). The values of Canada and Ontario were plotted on a destination map to indicate the positioning of Canada for each type of respondent. If Canada or Ontario is found in the upper left quadrant it is considered to offer excellent opportunities to experience culture and entertainment activities, but less likely to provide opportunities to experience nature or participate in outdoor activities. If Canada or Ontario is found in the lower right quadrant, it is considered to offer excellent opportunities to experience nature and participate in outdoor activities, but fewer opportunities for cultural experiences or entertainment. When Canada or Ontario is found in the upper right quadrant, it is perceived as a hybrid destination offering opportunities for both nature/outdoor experiences and culture/entertainment experiences. On the other hand, when Canada or Ontario is found in the lower left quadrant, it is either not well known or has weak imagery on both image dimensions.

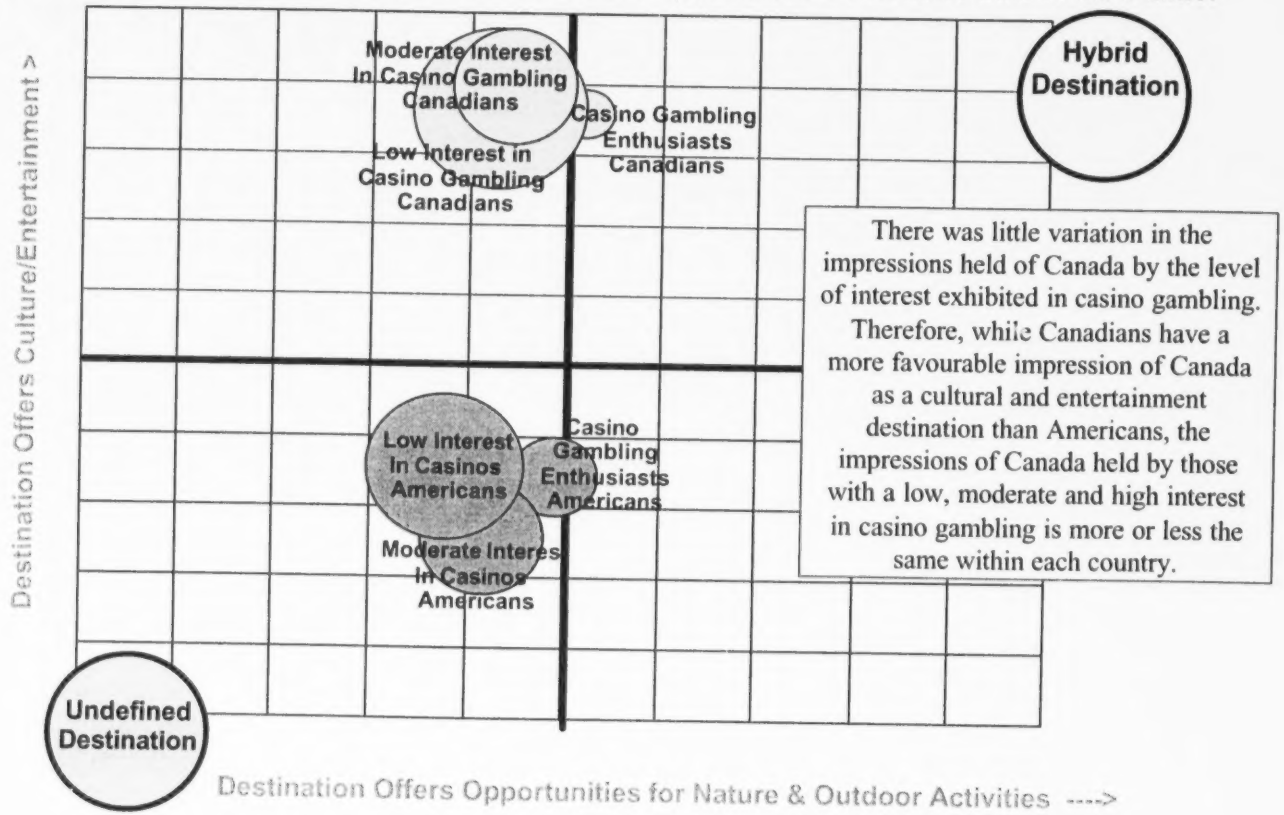

Culture & Entertainment Only
Culture/ Entertainment & Nature/Outdoor Activities
Hybrid Destination
Neither Culture/ Entertainment nor Nature/Outdoor Activities
Nature & Outdoor Activities Only
Undefined Destination
Destination Offers Opportunities for Culture & Entertainment --->
Destination Offers Opportunities for Nature & Outdoor Activities --->

Canada and United States

Canadian Vacation Imagery

By Interest in Casino Gambling While Travelling & Not Travelling

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Canada On One Plus Attributes : Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Market


Moderate Interest In Casino Gambling Canadians
Casino Gambling Enthusiasts Canadians
Low Interest in Casino Gambling Canadians
Hybrid Destination
Low Interest In Casinos Americans
Casino Gambling Enthusiasts Americans
Moderate Interest In Casinos Americans
Undefined Destination
Destination Offers Culture/Entertainment >
Destination Offers Opportunities for Nature & Outdoor Activities --->

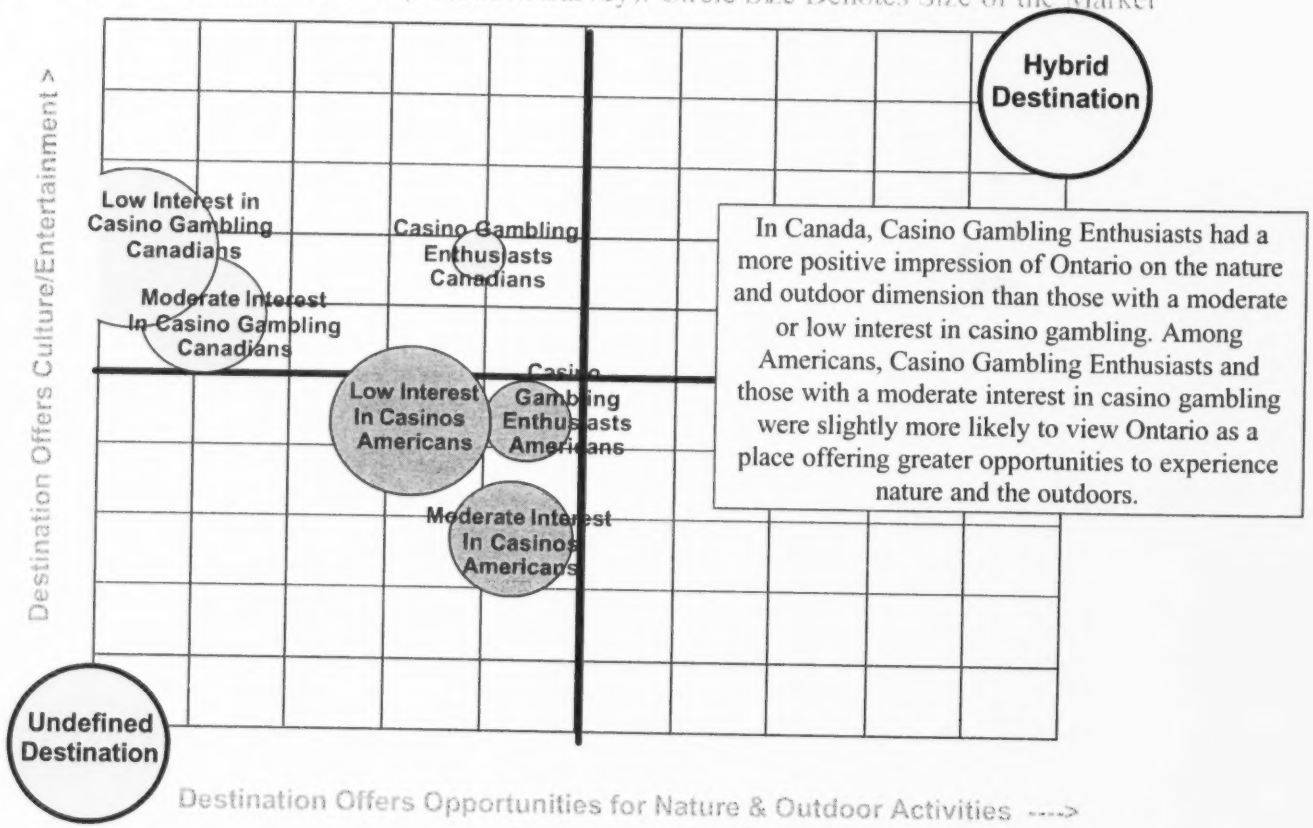
There was little variation in the impressions held of Canada by the level of interest exhibited in casino gambling. Therefore, while Canadians have a more favourable impression of Canada as a cultural and entertainment destination than Americans, the impressions of Canada held by those with a low, moderate and high interest in casino gambling is more or less the same within each country.

Canada and United States

Ontario Vacation Imagery

By Interest in Casino Gambling While Travelling & Not Travelling

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Ontario On One Plus Attributes : Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Market


Hybrid Destination
Low Interest in Casino Gambling Canadians
Casino Gambling Enthusiasts Canadians
Moderate Interest In Casino Gambling Canadians
Low Interest In Casinos Americans
Casino Gambling Enthusiasts Americans
Moderate Interest In Casinos Americans
Undefined Destination
Destination Offers Culture/Entertainment >
Destination Offers Opportunities for Nature & Outdoor Activities --->

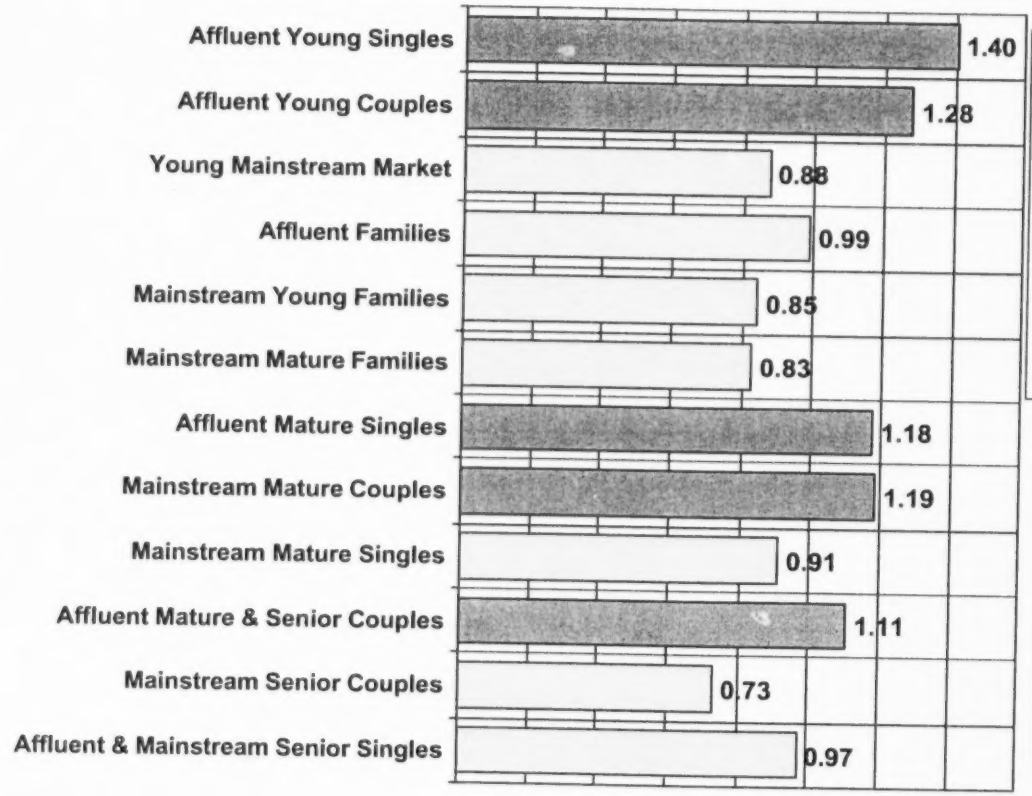
In Canada, Casino Gambling Enthusiasts had a more positive impression of Ontario on the nature and outdoor dimension than those with a moderate or low interest in casino gambling. Among Americans, Casino Gambling Enthusiasts and those with a moderate interest in casino gambling were slightly more likely to view Ontario as a place offering greater opportunities to experience nature and the outdoors.

Overall Market Potential

Interest in Casino Gambling: Canada

Interest in Casino Gambling By Likelihood of Travel Within Canada (Indexed)

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



The Overall Market Potential Index is constructed to identify those segments which are most likely to be responsive to marketing, advertising and promotional initiatives designed to promote casino gambling. This Index indicates that, in Canada, five affluent segments represent the primary target markets for such initiatives. The Affluent Young Singles and Affluent Young Couples score especially well on this index and should be considered prime markets for domestic casino-related tourism marketing.

Technical Note

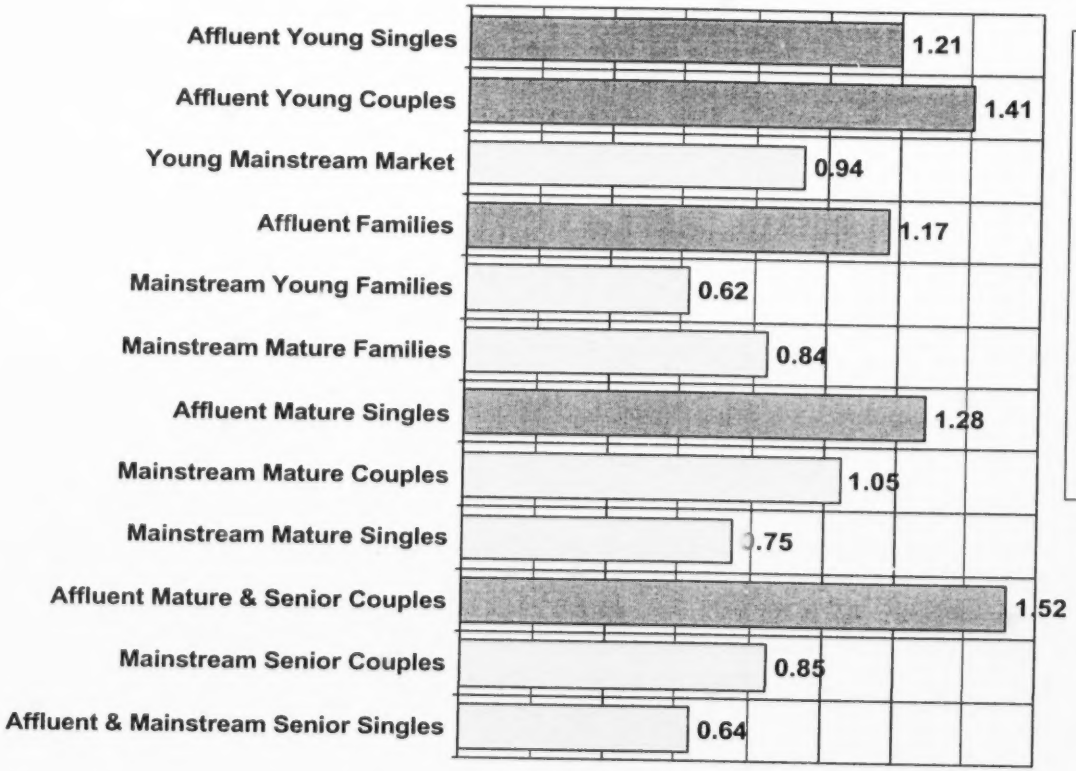
The Overall Market Potential Index is computed by multiplying the percent who exhibit an Interest in Casino Gambling related vacat ion products and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below one reflect below average market potential.

Overall Market Potential

Interest in Casino Gambling: United States

Interest in Casino Gambling By Likelihood of Travel To Canada (Indexed)

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



The Overall Market Potential Index for the United States shows a similar pattern to the one in Canada. The five affluent segments comprise the primary target market for casino-related tourism marketing and advertising. The Affluent Young Couples and Affluent Mature and Senior Couples score especially well on this index and should be the primary target markets for U.S. campaigns and promotional activities. The other three affluent segments (Affluent Young Singles, Affluent Families, Affluent Mature Singles) also do well on this dimension and should be considered secondary markets for such promotional activity.

Technical Note

The Overall Market Potential Index is computed by multiplying the percent who exhibit an Interest in Casino Gambling related vacation products and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below one reflect below average market potential.

Travel Activities & Motivation Survey

TAMS Technical Appendices

(For Use With the TAMS Reports)

TAMS
Travel Activities &
Motivation Survey

March, 2001

Lang

Appendix One

Statistical Precision and Confidence Intervals

Since the Travel Activities & Motivation Survey (TAMS) is based on a random probability sample (rather than a complete census), the statistics reported in this study are estimates. The accuracy of these estimates will vary from analysis to analysis depending on the sample size, the type of measurement reported and measurement variations. The statistical precision associated with any given estimate is reflected by its confidence interval.

A confidence interval is an estimate of the range of values which would be expected by chance alone for a selected probability level. For example, the "95 % confidence interval" is the range of values which would be expected to occur randomly 19 times out of 20 (or 95 % of the time). Thus, if a survey found that 50 % of the individuals in a sample of 500 were interested in a given activity, the 95 % confidence interval for this estimate would be ±3.5 % (or between 53.5 % to 46.5 %). This means that if this survey were conducted 20 times with the same size sample, the estimated level of respondents interested in a given activity would fall between 53.5 % and 46.5 % nineteen times out of 20.

The estimated confidence interval is affected by several factors including the sample size, the type of measure taken (i.e., whether the measurement may assume two values such as "yes" or "no", or many values such as "household income") and the level of variation which exists within the data. As a guideline to interpreting the results of this study, estimates of the 95 % confidence intervals are provided for various sample sizes in the table below:

Number of Cases in Sample

Percent	46000	12000	5000	1000	500	100
50.00%	0.05%	0.20%	0.49%	2.45%	4.90%	24.50%
40.00%	0.05%	0.20%	0.47%	2.35%	4.70%	23.52%
30.00%	0.04%	0.17%	0.41%	2.06%	4.12%	20.58%
20.00%	0.03%	0.13%	0.31%	1.57%	3.14%	15.68%
10.00%	0.02%	0.07%	0.18%	0.88%	1.76%	8.82%
5.00%	0.01%	0.04%	0.09%	0.47%	0.93%	4.66%
2.00%	0.00%	0.02%	0.04%	0.19%	0.38%	1.92%

Appendix Two

Telephone Sample Description: Weighted

Attribute	Level	Total	Canada	U.S.A.
Number of Interviews		46,782	28,397	18,385
Gender	Male	45.0 %	45.1 %	45.0 %
	Female	55.0 %	54.9 %	55.0 %
Age	18 to 25	13.6 %	13.3 %	13.9 %
	26 to 34	20.6 %	20.8 %	20.5 %
	36 to 44	23.3 %	24.1 %	22.8 %
	46 to 54	17.5 %	16.7 %	18.1 %
	56 to 65	11.2 %	11.4 %	11.0 %
	66 Plus	13.7 %	13.7 %	13.7 %
Education Level	High/Trade School	42.5 %	48.6 %	38.6 %
	College or University	49.3 %	46.7 %	51.0 %
	Advanced University Degree	8.1 %	4.7 %	10.4 %
Household Income	Under $20,000	14.8 %	17.8 %	12.8 %
	$20,000 to $40,000	22.9 %	24.6 %	21.8 %
	$40,000 to $60,000	18.9 %	19.0 %	18.9 %
	$60,000 to $80,000	11.8 %	11.7 %	11.8 %
	$80,000 to $100,000	6.4 %	6.3 %	6.4 %
	$100,000 Plus	8.8 %	7.4 %	9.7 %
	Refused/Don't Know	16.5 %	13.2 %	18.6 %

Appendix Two

Mailback Sample Description: Weighted

Attribute	Level	Total	Canada	U.S.A.
Number of Interviews		11,892	5,490	6,402
Gender	Male	43.7 %	44.0 %	43.6 %
	Female	56.3 %	56.0 %	56.4 %
Age	18 to 25	8.3 %	9.7 %	7.1 %
	26 to 34	17.9 %	19.1 %	16.8 %
	36 to 44	24.8 %	25.3 %	24.3 %
	46 to 54	21.7 %	20.0 %	23.1 %
	56 to 65	14.4 %	14.0 %	14.7 %
	66 Plus	13.0 %	11.9 %	14.0 %
Education Level	High/Trade School	31.8 %	38.0 %	26.5 %
	College or University	56.5 %	55.1 %	57.6 %
	Advanced University Degree	11.7 %	6.9 %	15.8 %
Household Income	Under $20,000	8.9 %	10.4 %	7.5 %
	$20,000 to $40,000	21.8 %	23.1 %	20.7 %
	$40,000 to $60,000	22.3 %	22.6 %	22.1 %
	$60,000 to $80,000	15.6 %	15.5 %	15.7 %
	$80,000 to $100,000	8.5 %	8.8 %	8.2 %
	$100,000 Plus	11.6 %	10.8 %	12.3 %
	Refused/Don't Know	11.3 %	8.8 %	13.5 %

Appendix Three

Household Life Cycle Stage

The Household Life Cycle Stage variable has been constructed taking the following variables into consideration: The age of the respondent, the age of all children under 21 living in the household, and the marital status of the respondent. There are eight life cycle stages identified in this variable:

- Young Singles: Not married or living common law; No children (of respondent) under 21 living in the home; Age between 18 and 35
- Young Couples: Married or living common law; No children (of respondent) under 21 living in the home; Age between 18 and 35
- Young Families: At least one child (of respondent) under 13 living in the home; No restrictions for age or marital status
- Mature Families: At least one child (of respondent) under 21 living in the home; No children under 13 living in the home; No restrictions for age or marital status
- Mature Couples: Married or living common law; No children (of respondent) under 21 living in the home; Age between 36 and 65
- Mature Singles: Not married or living common law; No children (of respondent) under 21 living in the home; Age between 36 and 65
- Senior Couples: Married or living common law; No children (of respondent) under 21 living in the home; Age 66 and older
- Senior Singles: Not married or living common law; No children (of respondent) under 21 living in the home; Age 66 and older

Appendix Four:
Lifespan Demographic Segments
- Method Used to Construct Segmentation -

Throughout this report, the TAMS data will be examined using a market segmentation known as the Lifespan Demographic Segments. This scheme identifies various demographic sectors in the market with common vacation patterns and interests.

The Lifespan Demographic Segmentation scheme is an anchored segmentation where the data has been aggregated by life cycle stage, education level and household income. Households may be assigned to any given segment with information about the household life cycle stage, the respondent's education and household income. As such, this scheme is a powerful tool to identify strategic segments.

The Lifespan Demographic Segmentation was developed using the Ontario Tourism Marketing Partnership tracking program, based on 7,241 interviews conducted between July 12, 1999 and April 26, 2000. The segmentation scheme uses information about the types of trips taken by each household, the respondent's tendency to research vacations, and the household's vacation preferences and interests. Thirty-one core segmentor variables were used in this analysis, including: The incidence of 19 types of vacation travel (e.g., family urban explorations, couples retreats, family visits, adventure travel); the extent to which vacations are carefully planned; the amount of information consulted to plan vacations; interest in opportunities to learn while on vacation; interest in novel and exotic destinations; interest in vacations suitable for families; the appeal of vacation packages; the appeal of outdoor vacations; the appeal of cultural exploration; the appeal of pampering and entertainment; the appeal of excitement and nightlife; and the appeal of relaxing in a quiet setting while on vacation.

Appendix Four: Lifespan Segmentation Descriptions

Youth Segments

The three youth segments represent 20.3 % of the total market. Two of these are classified as Affluent Segments because of their household incomes and/or level of education. These households are all under 35, do not have children and are single or married couples.

Affluent Young Singles

- 5.9 % of market; 6.5 % of Canadian market; 5.8 % of U.S. market
- Life Cycle Stages: 100 % young singles; 64.0 % of respondents male
- Average Age: 25.3 years; Age Range: 54.5 % 18 to 25; 45.5 % 26 to 35
- Education: 67.7 % university or college educated; 9.7 % with advanced degrees (e.g., master's)
- Average Household Income: $72,000; Income Categories: 68.7 % $40K to $80K; 31.3 % $80K plus

Affluent Young Couples

- 2.7 % of market; 3.9 % of Canadian market; 2.6 % of U.S. market
- Life Cycle Stages: 100 % young couples; 42.8 % of respondents male
- Average Age: 28.9 years; Age Range: 18.8 % 18 to 25; 81.2 % 26 to 35
- Education: 100 % university or college educated; 17.8 % with advanced degrees (e.g., master's)
- Average Household Income: $74,400; Income Categories: 66.2 % $40K to $80K; 33.8 % $80K plus

Mainstream Youth Market

- 11.8 % of market; 13.2 % of Canadian market; 11.6 % of U.S. market
- Life Cycle Stages: 73 % young singles; 27 % young couples; 56.9 % of respondents male
- Average Age: 25.0 years; Age Range: 57.4 % 18 to 25; 42.6 % 26 to 35
- Education Level: 53 % university or college educated; 4.5 % with advanced degrees (e.g., master's)
- Average Household Income: $24,600; Categories: 93.3 % less than $40K; 6.8 % $40K to $80K

Appendix Four: Lifespan Segmentation Descriptions

Family Segments

The three family segments represent 36.2 % of the total market. One of these is classified as an affluent segment because of its household incomes and/or level of education. All of these households have children under 21 and are primarily married. The Mainstream Young Families have at least one child 12 or younger while the Mainstream Mature Families have children between the ages of 13 and 21 (but no children 12 and under).

Affluent Families

- 6.6 % of market; 5.8 % of Canadian market; 6.7 % of U.S. market
- Life Cycle Stages: 69.9 % young families; 26.4 % mature families; 50 % of respondents male
- Average Age: 41.2 years; Age Range: 23.9 % under 35; 46.8 % 36 to 45; 29.3 % 46 and older
- Education: 100.0 % university or college educated; 29.1 % with advanced degrees (e.g., master's)
- Average Household Income: $107,400; Income Categories: 2.3 % $40K to $80K; 97.7 % $80K plus

Mainstream Young Families

- 23.0 % of market; 20.1 % of Canadian market; 23.4 % of U.S. market
- Life Cycle Stages: 100 % families with children 12 or younger; 42.9 % of respondents male
- Average Age: 35.3 years; Age Range: 52.8 % under 35; 37.1 % 36 to 45; 10.1 % 46 and older
- Education: 50 % university or college educated; 5.5 % with advanced degrees (e.g., master's)
- Average Household Income: $42,800; Income Categories: 49.0 % less than $40K; 51.0 % $40K plus

Mainstream Mature Families

- 6.6 % of market; 8.1 % of Canadian market; 6.4 % of U.S. market
- Life Cycle Stages: 100 % families with children between 13 and 21; 45.1 % of respondents male
- Average Age: 45.3 years; Age Range: 7.8 % under 35; 47.6 % 36 to 45; 44.6 % 46 and older
- Education Level: 47 % university or college educated; 5.5 % with advanced degrees (e.g., master's)
- Average Household Income: $48,200; Income Categories: 37.9 % less than $40K; 62.1 % $40K plus

Appendix Four: Lifespan Segmentation Descriptions

Mature Segments

The three mature segments represent 30.4 % of the total market. One of these is classified as an affluent segment because of its household incomes and/or level of education. These households are all between 36 and 64 and do not have children. (Note: 3.8 % of the mature market has been classified with seniors in the Affluent Mature & Senior Couples).

Affluent Mature Singles

- 5.1 % of market; 2.4 % of Canadian market; 5.4 % of U.S. market
- Life Cycle Stages: 100 % mature singles (36 to 65); 58.1 % of respondents male
- Average Age: 48.5 years; Age Range: 40.2 % 36 to 45; 37.6 % 46 to 55; 22.2 % 56 to 65
- Education: 100 % university or college educated; 26.5 % with advanced degrees (e.g., master's)
- Average Household Income: $71,000; Income Categories: 72.8 % $40K to $80K; 27.2 % $80K plus

Mainstream Mature Couples

- 12.8 % of market; 18.0 % of Canadian market; 12.3 % of U.S. market
- Life Cycle Stages: 100 % mature couples (36 to 65); 52.1 % of respondents male
- Average Age: 52.1 years; Age Range: 23.4 % 36 to 45; 38.4 % 46 to 55; 38.2 % 56 to 65
- Education: 48 % university or college educated; 6.0 % with advanced degrees (e.g., master's)
- Average Household Income: $49,600; Income Categories: 34.1 % less than $40K; 59.8 % $40K plus

Mainstream Mature Singles

- 8.6 % of market; 6.8 % of Canadian market; 8.9 % of U.S. market
- Life Cycle Stages: 73 % mature singles (36 to 65); 58.1 % of respondents male
- Average Age: 50.2 years; Age Range: 35.0 % 36 to 45; 34.0 % 46 to 55; 31.1 % 56 to 65
- Education Level: 42 % university or college educated; 3.9 % with advanced degrees (e.g., master's)
- Average Household Income: $28,800; Income Categories: 84.0 % less than $40K; 16.0 % $40K plus

Appendix Four: Lifespan Segmentation Descriptions

Mature/Senior Segments

The three mature/senior segments represent 16.8 % of the total market. One of these segments is classified as an affluent segment because of its household incomes and/or level of education. The Affluent Mature and Senior Couples are primarily (85 %) from the mature market while the Mainstream Senior Couples and Senior Singles are all over 66 years old.

Affluent Mature and Senior Couples

- 4.5 % of market; 3.5 % of Canadian market; 4.7 % of U.S. market
- Life Cycle Stages: 85 % mature couples (35 to 65); 15 % senior couples (66 plus); 54.6 % male
- Average Age: 54.5 years; Age Range: 21.0 % 36 to 45; 37.3 % 46 to 55; 41.7 % 56 plus
- Education: 100 % university or college educated; 30.8 % with advanced degrees (e.g., master's)
- Average Household Income: $108,600; Income Categories: 100 % $80K plus

Mainstream Senior Couples

- 5.0 % of market; 6.5 % of Canadian market; 4.8 % of U.S. market
- Life Cycle Stages: 100 % senior couples (66 plus); 56.1 % of respondents male
- Average Age: 72.7 years; Age Range: 100 % 66 plus
- Education: 42.4 % university or college educated; 5.8 % with advanced degrees (e.g., master's)
- Average Household Income:$37,900; Income Categories: 57.4 % Less than $40K; 42.6 % $40K plus

(Affluent and Mainstream) Senior Singles

- 7.3 % of market; 5.1 % of Canadian market; 7.5 % of U.S. market
- Life Cycle Stages: 100 % senior singles; 35.6 % of respondents male
- Average Age: 74.9 years ; Age Range: 100 % 66 plus
- Education Level: 43 % university or college educated; 8.0 % with advanced degrees (e.g., master's)
- Average Household Income:$28,600; Income Categories: 78.7 % Less than $40K; 21.3 % $40K plus

Appendix Three

Factor Analysis of Vacation Experiences Sought During Past Two Years

The vacation experiences sought in the last two years were submitted to a factor analysis to identify underlying vacation experiences sought in pleasure travel. Factor analysis is a statistical technique which identifies and uses the association between individual responses to generate more general (or abstract) measures of the vacation experiences sought.The factors may be used to generate factor scores which reflect the general vacation experiences sought. This analysis identified the following five vacation experience factors:

Exploration: To visit historical sites and important places in history; To see natural wonders and important natural sites; To experience different cultures and ways of life; To experience unspoiled nature

Personal Indulgence: To visit a popular, trendy place; To visit casinos and gamble; To experience "the good life" - fine cuisine, being pampered; To experience city life (e.g., nightlife, shopping, museums)

Romance & Relaxation: To rest, relax and recuperate; For intimacy and romance; To spend quality time with the family away from home

Sports, Hobbies & Learning: To participate in a hobby or sport (e.g., golf, fishing, photography); To participate in a hands-on learning experience (e.g., archaeological digs, cooking courses)

Socializing: To visit friends or relatives who live in another city or country; To spend time with a group of good friends; To be someplace that feels familiar and safe

Appendix Four

Factor Analysis of Outdoor Activities While Travelling

The outdoor vacation activities sought in the last two years were submitted to a factor analysis to identify general outdoor activities sought in travel. Factor analysis is a statistical technique which uses the association between individual responses to construct more general (or abstract) categories of outdoor activities sought by individuals while travelling. The factors may be used to generate factor scores which measure the degree to which these general categories of outdoor activities have been pursued by various types of travellers. This analysis identified the following 17 types of outdoor activities:

Competitive Sports: Playing basketball; Baseball; Football; Volleyball; Bowling; Soccer; Chess or backgammon; Tennis

Nature Sports: Whitewater rafting; Kayaking & canoeing; Hiking or backpacking; Horseback riding

Water Sports: Sailing; Windsurfing; Scuba diving

Extreme Sports: Hang-gliding; Hot-air ballooning; Parachuting; Bungee jumping

Golfing: Golfing at a resort; Taking a golf package tour; Playing occasional golf game

Biking: Recreational biking; Mountain biking; Biking on overnight tour trip

Motorcycling: Motorcycling on overnight touring trip; Motorcycling - Day excursion

Fishing: Salt water fishing; Fresh water fishing; Motorboating

Hunting: Hunting big game; Hunting small game

Fitness: Jogging outdoors; Working out in fitness centre

Skiing & Snowboarding: Cross-country skiing (day activity; overnight tour group); Downhill skiing; Snowboarding

Snowmobiling: Snowmobiling as an overnight tour trip; Snowmobiling on organized trails

Skating & Hockey: Ice skating; Playing ice hockey; In-line/Roller-skating

Rock & Ice Climbing: Rock climbing; Ice climbing; Heli-skiing

Swimming & Sunbathing: Sunbathing or sitting on a beach; Swimming in oceans; Swimming in lakes

Natural Sightseeing: Wildflower & flora viewing; Birdwatching; Going on picnics in park settings

Natural Phenomena: Seeing the northern lights or other Arctic experiences; Whale watching

Appendix Five

Factor Analysis of Cultural & Entertainment Activities Participated In

The cultural and entertainment vacation activities sought in the last two years were submitted to a factor analysis to identify general categories of cultural and entertainment activities sought during travel. Factor analysis is a statistical technique which uses the association between individual items to construct more general (or abstract) categories of cultural and entertainment activities that tend to be sought by individuals while travelling. The factors may be used to generate factor scores which measure the degree to which these general categories of cultural and entertainment activities have been pursued by various segments of the travel market. This analysis identified the following 15 activity types:

Shopping & Dining: **Shopping or browsing**: Clothing, shoes, jewelry; Bookstores and music stores; Local arts and crafts; Gourmet food; **Restaurant dining**: Regional or local cooking; Acclaimed restaurants

Museums, Art Galleries & Historical Sites: General history/heritage museums, Historical sites (e.g., Statue of Liberty, Fort Alamo), Science & technology museums, Historical replicas/re-enactments, Art galleries

High Arts: Opera, Classical concerts, Ballet or other dance performance, Live theatre

Theme Parks: Movie theme parks (MGM studios), Science & technology theme parks (Epcot), Amusement parks (Disneyland)

Professional Sports: Baseball, Football, Basketball, Ice hockey, Professional golf

Zoos, Aquariums, Planetariums: Zoos, Aquariums, Children's museums, Planetariums

Agricultural & Local Fairs: Farmers' fair or market, Local festivals or fairs, Pick-your-own farms or participating in harvesting, Shop or browse for antiques

Concerts, Carnivals or Festivals: Music festivals, Carnivals such as Mardi Gras, Jazz concerts, Rock & roll concerts, Musical attractions like Rock'n Roll Museum

Aboriginal Cultural Experiences: Aboriginal cultural experiences in remote settings, Powwows or other aboriginal celebrations, Aboriginal attractions such as the Indian Museum

Gardening & Natural Wonders: Botanical gardens, Garden attractions such as Cypress Gardens or Tivoli Park, Natural wonders such as Niagara Falls or the Grand Canyon

Cultural Festivals: Literary festivals or events, Theatre festivals, International film festivals

National/International Sporting Events: National/International sporting events, Professional figure skating

Gambling & Racing: Horse racing, Casinos, Auto racing

Rodeo & Amateur Tournaments: Western theme events such as rodeos, Amateur sports/arts/hobby tournaments

French Canadian Cultural Experiences: French Canadian cultural experiences

Appendix Six

Factor Analysis of Accommodation-Related Activities Participated In

The types of accommodation-related activities participated in during the last two years were submitted to a factor analysis to identify general activity-related accommodation types. Factor analysis is a statistical technique which uses the association between individual items to construct more general (or abstract) categories of activity-related accommodations. The factors may be used to generate factor scores which measure the degree to which general types of activity-related accommodations have been stayed in by each segment of the travel market. This analysis identified the following seven types of activity-related accommodations:

Camping: Camping outside of public camp grounds, Camping in public camp grounds, Camping in wilderness settings

Cooking & Wine Tasting Schools: Staying at cooking school, Staying at wine tasting schools

Lakeside or Wilderness Lodges (Vehicle Accessible): Vehicle accessible wilderness lodge, Lakeside resort in summer, Lakeside resort in winter

Remote Fly-in Lodges or Outposts: Staying at remote fly-in outpost, Staying at remote fly-in lodge

Ski Resorts: Staying at ski resort in summer, Staying at ski resort in winter

Seaside Resorts: Staying at seaside resort in winter, Staying at seaside resort in summer

Bed & Breakfast, Health Spas & Gourmet Restaurants With Accommodations: Staying at bed & breakfast, Staying at health spa, Staying at gourmet restaurants

Appendix Seven

Factor Analysis of Tours & Cruises Taken During Last Two Years

The types of tours and cruises taken during the last two years were submitted to a factor analysis to identify general tour/cruise types. Factor analysis is a statistical technique which uses the association between responses to individual items to construct more general (or abstract) categories of touring activities. The factors may be used to generate factor scores, which measure the degree to which each category of tours has been taken by various types of travellers. This analysis identified seven types of tours and cruises:

Tours By Personal Vehicles: Coastal or lakeshore scenic drives by day, Wandering around small villages & towns - overnight

Guided Bus Tours: Scenic day tours in countryside by bus, Guided bus day tours in cities, Guided scenic tours of countryside involving an overnight stay

Wine Tours: Going to wineries for day visits, Touring a region's wineries involving an overnight stay

Specialty Cruises: Great Lakes cruises by boat involving an overnight stay, Submarine cruises involving an overnight stay

Scenic Tours By Boat or Train: Scenic day or evening tour by boat, Scenic day tours by train

Scenic Day Tour By Air: Scenic day tour by air

Ocean Cruises: Ocean cruises

Appendix Eight
Factor Analysis of Canada's Image Attributes

The image ratings of Canada and Ontario were factor analysed to identify the primary image dimensions upon which Canada and Ontario were assessed. Factor analysis is a statistical technique which uses the association between each individual image attribute to construct more general image attributes. The more general image dimensions identified through this process are considered to reflect the underlying (or true) impressions of Canada and Ontario that have been the basis of the individual's response to each attribute. The factors may be used to generate factor scores which measure the degree to which each general impression of Canada or Ontario is held by the respondent. The 25 image factors were grouped into two broader image dimensions as follows:

Culture & Entertainment

A destination that is perceived to offer opportunities to experience culture and entertainment is seen to be a popular, trendy place, with many cultural attractions and events, a great place to see historical sites and important places in history, and a great place to experience different cultures and ways of life. Such a place is also considered to be a great place to experience city life, with many interesting shops and lots to see and do. A cultural and entertainment destination tends to be better known for its urban (cultural and entertainment) centres than its natural richness and opportunities for outdoor vacation activities. The specific image attributes that tend to be associated with this factor include: A popular, trendy place; A place with many cultural attractions and events; A great place to experience city life (e.g., nightlife, shopping); A place with interesting shops; A place you go for romance; A great place to see historical sites and important places in history; A place with lots of things for young adults to see and do; A place with lots for families to see and do; A great place to experience different cultures and ways of life; A place with lots of things for mature adults to see and do.

Nature & Outdoor Activities

A destination that is perceived to offer opportunities to experience nature and participate in outdoor activities tends to be perceived as a great place for fishing, hunting and outdoor activities in general. Such a destination is considered likely to have beautiful scenery, to be very clean and well cared for, and to be a place that respects the natural environment. Destinations that offer opportunities to experience nature and participate in outdoor activities are also perceived to be very safe for tourists, great places to relax and get away from it all, and great places for adventure and excitement. Such destinations are generally better known for their natural richness than their urban and cultural richness. The specific image attributes that tend to be associated with this factor include: A great place for hunting; A place that respects the natural environment; One of the best destinations for outdoor activities; A place with beautiful scenery; A place that is very clean and well cared for; A place that is safe for tourists; A great place for adventure and excitement; A great place to relax and get away from it all.

Culture & Entertainment

A destination that is perceived to offer opportunities to experience culture and entertainment is seen to be a popular, trendy place, with many cultural attractions and events, a great place to see historical sites and important places in history, and a great place to experience different cultures and ways of life. Such a place is also considered to be a great place to experience city life, with many interesting shops and lots to see and do. A cultural and entertainment destination tends to be better known for its urban (cultural and entertainment) centres than its natural richness and opportunities for outdoor vacation activities.

- A popular, trendy place
- A place with many cultural attractions and events
- A great place to experience city life (e.g., nightlife, shopping)
- A place with interesting shops
- A place you go for romance
- A great place to see historical sites and important places in history
- A place with lots of things for young adults to see and do
- A place with lots for families to see and do
- A great place to experience different cultures and ways of life
- A place with lots of things for mature adults to see and do

Nature & Outdoor Activities

A destination that is perceived to offer opportunities to experience nature and participate in outdoor activities tends to be perceived as a great place for fishing, hunting and outdoor activities in general. Such a destination is considered likely to have beautiful scenery, to be very clean and well cared for, and to be a place that respects the natural environment. Destinations that offer opportunities to experience nature and participate in outdoor activities are also perceived to be very safe for tourists, great places to relax and get away from it all, and great places for adventure and excitement. Such destinations are generally better known for their natural richness than their urban and cultural richness.

- A great place for fishing
- A great place for hunting
- A place that respects the natural environment
- One of the best destinations for outdoor activities
- A place with beautiful scenery
- A place that is very clean and well cared for
- A place that is safe for tourists
- A great place for adventure and excitement
- A great place to relax and get away from it all